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

2012

Open to Public Inspection

For calendar year 2012 or tax year beginning , 2012, and ending , 20

Name of foundation JAMES & MARIE MCCURDY FAMILY
aka LARRY MCCURDY

A Employer identification number 42-6468384

Number and street (or P O box number if mail is not delivered to street address) PO BOX 222 Room/suite

B Telephone number (see instructions) (641)933-4352

City or town, state, and ZIP code FREMONT, IA 52561-0222

C If exemption application is pending, check here ☐

G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ 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) ▶ $ 1,737,000

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

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 instructions))

	Line	Description	(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)	3,110			
	2	Check ▶ ☒ if the foundation is not required to attach Sch B				
	3	Interest on savings and temporary cash investments	14	14	14	
	4	Dividends and interest from securities	44,723	44,723	44,723	
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	43,359			
	b	Gross sales price for all assets on line 6a 645,693				
	7	Capital gain net income (from Part IV, line 2)		43,359		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule) STM106	85	85	85	
	12	**Total.** Add lines 1 through 11	91,291	88,181	44,822	
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc				
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule) STM108	950	950	950	
	c	Other professional fees (attach schedule) STM109	14,914	14,914	14,914	
	17	Interest				
	18	Taxes (attach schedule) (see instructions) STM110	900	413	413	
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)				
	24	**Total operating and administrative expenses.** Add lines 13 through 23	16,764	16,277	16,277	0
	25	Contributions, gifts, grants paid	84,704			75,645
	26	**Total expenses and disbursements.** Add lines 24 and 25	101,468	16,277	16,277	75,645
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	(10,177)			
	b	**Net investment income** (if negative, enter -0-)		71,904		
	c	**Adjusted net income** (if negative, enter -0-)			28,545	

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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 (a) Book Value	End of year (b) Book Value	End of year (c) Fair Market Value
Assets	1 Cash - non-interest-bearing	323,337	125,314	125,314
	2 Savings and temporary cash investments			
	3 Accounts receivable ▶			
	Less. allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule) ▶			
	Less· allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U S and state government obligations (attach schedule)			
	b Investments - corporate stock (attach schedule) STM137	1,284,648	1,483,809	1,610,101
	c Investments - corporate bonds (attach schedule)			
	11 Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation (attach schedule) ▶			
	12 Investments - mortgage loans			
	13 Investments - other (attach schedule)			
	14 Land, buildings, and equipment basis ▶			
	Less accumulated depreciation (attach schedule) ▶			
	15 Other assets (describe ▶ STM120)	841	1,585	1,585
	16 **Total assets** (to be completed by all filers - see the instructions Also, see page 1, item I)	1,608,826	1,610,708	1,737,000
Liabilities	17 Accounts payable and accrued expenses		3,000	
	18 Grants payable	75,645	84,704	
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶)			
	23 **Total liabilities** (add lines 17 through 22)	75,645	87,704	
Net Assets or Fund Balances	**Foundations that follow SFAS 117, check here** ▶ ☐ **and complete lines 24 through 26 and lines 30 and 31.**			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒ **and complete lines 27 through 31.**			
	27 Capital stock, trust principal, or current funds	1,533,181	1,523,004	
	28 Paid-in or capital surplus, or land, bldg , and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 **Total net assets or fund balances** (see instructions)	1,533,181	1,523,004	
	31 **Total liabilities and net assets/fund balances** (see instructions)	1,608,826	1,610,708	

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	1,533,181
2 Enter amount from Part I, line 27a	2	(10,177)
3 Other increases not included in line 2 (itemize) ▶	3	
4 Add lines 1, 2, and 3	4	1,523,004
5 Decreases not included in line 2 (itemize) ▶	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,523,004

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 (yr , mo , day)	(d) Date sold (yr , mo , day)
1a	ED JONES PUBLICLY TRADED SECURITIES	P	2012-02-22	2012-10-11
b	ED JONES PUBLICLY TRADED SECURITIES	P	2011-09-12	2012-06-12
c	ED JONES PUBLICLY TRADED SECURITIES	P	2009-08-31	2012-06-12
d	MG STAN PUBLICLY TRADED SECURITIES	P	2011-12-15	2012-03-02
e	MG STAN PUBLICLY TRADED SECURITIES	P	2010-01-14	2012-03-02

	(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	19,103		19,683	(580)
b	13,038		14,131	(1,093)
c	224,733		206,523	18,210
d	88,085		89,959	(1,874)
e	300,734		272,038	28,696

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				(580)
b				(1,093)
c				18,210
d				(1,874)
e				28,696

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	43,359
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8	3	(3,547)

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 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))
2011	69,146	1,512,896	0.045704
2010	65,581	1,382,918	0.047422
2009	32,767	1,311,626	0.024982
2008	16,292	655,333	0.024861
2007	12,561	325,839	0.03855

2 **Total** of line 1, column (d)	2	0.181519
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	0.036304
4 Enter the net value of noncharitable-use assets for 2012 from Part X, line 5	4	1,694,088
5 Multiply line 4 by line 3	5	61,502
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	719
7 Add lines 5 and 6	7	62,221
8 Enter qualifying distributions from Part XII, line 4	8	75,645

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

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 ▶ [X] and enter 1% of Part I, line 27b	1	719
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	719
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	719
6	Credits/Payments		
a	2012 estimated tax payments and 2011 overpayment credited to 2012 — 6a		
b	Exempt foreign organizations - tax withheld at source — 6b		
c	Tax paid with application for extension of time to file (Form 8868) — 6c: 719		
d	Backup withholding erroneously withheld — 6d		
7	Total credits and payments Add lines 6a through 6d	7	719
8	Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	
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	
11	Enter the amount of line 10 to be **Credited to 2013 estimated tax** ▶ Refunded ▶	11	

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?	1b		X
	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		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year **(1)** On the foundation ▶ $ ______ **(2)** On foundation managers ▶ $ ______			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ ______			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities	2		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	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		N/A
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T	5		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?	6	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	7	X	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶			
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	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 2012 or the taxable year beginning in 2012 (see instructions for Part XIV)? If "Yes," complete Part XIV	9		X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X

Part VII-A Statements Regarding Activities (continued)

			Yes	No
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?	13	X	

Website address ▶ N/A

14 The books are in care of ▶ LARRY L MCCURDY Telephone no ▶ 641-933-4352

Located at ▶ P O BOX 222 FREMONT, IA ZIP+4 ▶ 52561

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041**-Check here ▶ ☐

and enter the amount of tax-exempt interest received or accrued during the year ▶ 15

			Yes	No
16	At any time during calendar year 2012, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		X
	See the instructions for exceptions and filing requirements for Form TD F 90-22 1 If "Yes," enter the name of the foreign country ▶			

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

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

			Yes	No
1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?	1b		NA
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2012?	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 2012, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2012? ☐ Yes ☒ No			
	If "Yes," list the years ▶ ____, ____, ____, ____			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement - see instructions)	2b		N/A
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 2012 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 2012)	3b		NA
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 2012?	4b		X

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

			Yes	No
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 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 instructions)?	5b		NA
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐ NA			
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ No NA			
	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?	7b		NA

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

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
JANICE ESPY P O BOX 820 FAIRFIELD, IA 52556	TRUSTEE 0	0	0	0
JUDITH CARRIKER 1704 S PARK AVE OSKALOOSA, IA 52577	TRUSTEE 0	0	0	0
LARRY MCCURDY P O BOX 222 FREMONT, IA 52561	TRUSTEE 0	0	0	0

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

(a) Name and address of each employee paid more than $50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
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 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 ▶		

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 SEE PART XV FOR CONTRIBUTIONS PAID CONTRIBUTIONS MADE ONLY TO NON PROFIT EDUCATIONAL AND CHARITABLE ORGANIZATIONS	0
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 NONE	
2	
All other program-related investments See instructions 3	
Total. Add lines 1 through 3 ▶	

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	1,542,051
b	Average of monthly cash balances	1b	177,835
c	Fair market value of all other assets (see instructions)	1c	0
d	**Total** (add lines 1a, b, and c)	1d	1,719,886
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	1,719,886
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	25,798
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	1,694,088
6	**Minimum investment return.** Enter 5% of line 5	6	84,704

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	84,704
2a	Tax on investment income for 2012 from Part VI, line 5	2a	719		
b	Income tax for 2012. (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	719
3	Distributable amount before adjustments Subtract line 2c from line 1			3	83,985
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	83,985
6	Deduction from distributable amount (see instructions)			6	
7	**Distributable amount** as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1			7	83,985

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	75,645
b	Program-related investments - total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	75,645
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions)	5	719
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	74,926

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 2011	(c) 2011	(d) 2012
1	Distributable amount for 2012 from Part XI, line 7				83,985
2	Undistributed income, if any, as of the end of 2012				
a	Enter amount for 2011 only			75,158	
b	Total for prior years ____, ____, ____				
3	Excess distributions carryover, if any, to 2012				
a	From 2007				
b	From 2008				
c	From 2009				
d	From 2010				
e	From 2011				
f	**Total** of lines 3a through e				
4	Qualifying distributions for 2012 from Part XII, line 4 ▶ $ 75,645				
a	Applied to 2011, but not more than line 2a			75,158	
b	Applied to undistributed income of prior years (Election required - see instructions)				
c	Treated as distributions out of corpus (Election required - see instructions)				
d	Applied to 2012 distributable amount				
e	Remaining amount distributed out of corpus				
5	Excess distributions carryover applied to 2012 (If an amount appears in column (d), the same amount must be shown in column (a))				
6	**Enter the net total of each column as indicated below:**				
a	Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b	Prior years' undistributed income Subtract line 4b from line 2b				
c	Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d	Subtract line 6c from line 6b Taxable amount - see instructions				
e	Undistributed income for 2011 Subtract line 4a from line 2a. Taxable amount - see instructions				
f	Undistributed income for 2012 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2013				83,985
7	Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)				
8	Excess distributions carryover from 2007 not applied on line 5 or line 7 (see instructions)				
9	**Excess distributions carryover to 2013.** Subtract lines 7 and 8 from line 6a				
10	Analysis of line 9				
a	Excess from 2008				
b	Excess from 2009				
c	Excess from 2010				
d	Excess from 2011				
e	Excess from 2012				

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2012, enter the date of the ruling . . . . N/A ▶

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

	Tax year	Prior 3 years			
	(a) 2012	(b) 2011	(c) 2010	(d) 2009	(e) Total
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a		N/A			
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon a "Assets" alternative test - enter (1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test - enter (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the foundation had $5,000 or more in assets at any time during the year - see instructions.)

1 Information Regarding Foundation Managers:

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

NONE,

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

NONE,

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

Check here ▶ [X] 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 or e-mail of the person to whom applications should be addressed

NA

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 Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
SEE ATTACHED			SEE ATTACHED	
				75,645
Total ▶ 3a				75,645
b Approved for future payment				
SEE ATTACHED			SEE ATTACHED	
				84,704
Total ▶ 3b				84,704

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	14	
4 Dividends and interest from securities			14	44,723	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory					
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a REFUNDS			14	85	
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)				44,822	

13 Total. Add line 12, columns (b), (d), and (e) . . . 13 44,822

(See worksheet in line 13 instructions to verify calculations)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions)
	NA

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

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements
		N/A	

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		

Sign Here

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

LARRY MCCURDY Larry McCurdy 8/15/13 TRUSTEE

Signature of officer or trustee | Date | Title

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

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
CHUCK C CONVERSE	Chuck C. Converse	8-15-13		P00026443

Firm's name ▶ HUNT & ASSOCIATES P C — Firm's EIN ▶ 42-1395096

Firm's address ▶ 1201 HIGH AVE WEST OSKALOOSA IA 52577 — Phone no 641-672-2541

James & Marie McCurdy Family Charitable Trust
42-6468384
Form 990-PF,Part XV,Line 3 (b): Approved for Future Payment

	$ 84,704 To Distribute	Dollars to Each Entity
(1) Bidwell Riverside 1203 Heartford Avenue Des Moines, IA 50315 Purpose: Individual & family ministries		$ 1,500
(2) MUMM's Attn: Peggy J. Egbert PO Box 204 Richland, IA 52585 Purpose: Children missionary work		$ 4,500
(3) Iowa Weslyan College Attn: Office of Institutional Relations 601 N Main Street Mt. Pleasant, IA 52641-1398 Purpose: James & Marie McCurdy Endowed Scholarship		$ 2,500
(4) Samaritan's Purse PO Box 3000 Boone, NC 28607-3000 Purpose: Christian Humanitarian Work		$ 7,500
(5) The Salvation Army PO Box 249 Ottumwa, IA 52501-0249 Purpose: Local Christian outreach work		$ 2,500
(6) LOVE, Inc PO Box 213 Oskaloosa, IA 52577 Purpose: Local missions		$ 1,500
(7) Ecumenical Cupboard Oskaloosa, IA 52577 Purpose: Food relief		$ 2,000

(8) God's Kids 11700 Industry Avenue Fontana, CA 92337-6934 Purpose: Orphanage(s) with greatest need(s)	$	2,500
(9) Habitat for Humanity PO Box 583 Oskaloosa, IA 52577 Purpose: Local project	$	2,500
(10) Child Evangelism Fellowship PO Box 652 Oskaloosa, IA 52577 Purpose: Children ministries	$	2,000
(11) Food for the Hungry 1224 Washington Street Phoenix, AZ 85034 Purpose: Feeding programs	$	3,000
(12) Prison Fellowship PO Box 1550 Merrifield, VA 22116-1550 Purpose: Prison ministries	$	4,000
(13) RBC Ministries 3000 Kraft Ave SE Grand Rapids, MI 49512 Purpose: Christian ministries	$	2,000
(14) Crisis Intervention Services 500 High Ave West Oskaloosa, IA 52577 Purpose: Women's/Children's Shelter	$	500
(15) Doctors Without Boarders 333 Seventh Ave, 2nd Floor New York, NY 10001 Purpose: Medical projects	$	1,500

(16) The Smile Train 41 Madison Ave, 28th Floor New York, NY 10010 Purpose: Children Medical Surgeries	$	2,500
(17) Hope Ministries PO Box 862 Des Moines, IA 50304-0862 Purpose: Christian Outreach Programs	$	2,000
(18) Alzheimer's Association Greater Iowa Chapter 1730 28th Street West Des Moines, IA 50266-1436 Purpose: Research work	$	1,000
(19) National Parkinson Foundation, Inc. Office of Development 1501 NW 9th Ave/Bob Hope Road Miami, FL 33136-1494 Purpose: Research work	$	1,000
(20) Hopewell Church 10400 Echo Avenue Blakesburg, IA 52536 Purpose: Christian ministries	$	3,000
(21) Christain Appalachian Project PO Box 55911 Lexington, KY 40555-5911 Purpose. Care for the Poor	$	1,000
(22) Blank Children's Hospital 1200 Pleasant Street Des Moines, IA 50309 Purpose: Children's Hospital Care	$	1,204
(23) Billy Graham Evangelistic Association Attn: Planned Giving Administration 1 Billy Graham Parkway Charlotte, NC 28201-0001 Purpose: Christian Ministries	$	5,000

(24) Food Bank of Southern Iowa, Inc. PO Box 1294 705 West Main Ottumwa, IA 52501 Purpose: Food Relief		$ 1,000
(25) The Salvation Army PO Box 487 Oskaloosa, IA 52577 Purpose: Christian Outreach Work		$ 1,000
(26) Christian Broad Casting Network (CBN) 977 Centerville Turnpike Virginia Beach, VA 23463 Purpose: Christian Ministries		$ 2,000
(27) Gospel For Asia 1800 Golden Trail Court Carrollton, TX 75010-4649 Purpose: Asian Missionary Outreach		$ 2,000
(28) World Christian Broadcasting 605 Bradley Ct. Franklin, TN 37067 Purpose: Broadcasting Christian The Good News of Jesus Christ		$ 2,000
(29) Mahaska County Outreach 114 N. 1st Street Oskaloosa, IA 52577 Purpose: Building Fund/upkeep		$ 20,000
	Totals	$ 84,704

James & Marie McCurdy Family Charitable Trust
42-6468384
Form 990-PF,Part XV,Line 3 (a): Paid During Year

	$75,645 To Distribute	Dollars to Each Entity
(1) Bidwell Riverside 1203 Heartford Avenue Des Moines, IA 50315 Purpose: Individual & family ministries		$ 2,000
(2) MUMM's Attn: Peggy J. Egbert PO Box 204 Richland, IA 52585 Purpose: Children missionary work		$ 5,000
(3) Iowa Weslyan College Attn: Office of Institutional Relations 601 N Main Street Mt. Pleasant, IA 52641-1398 Purpose: James & Marie McCurdy Endowed Scholarship		$ 2,500
(4) Samaritan's Purse PO Box 3000 Boone, NC 28607-3000 Purpose: Christian Humanitarian Work		$ 7,500
(5) The Salvation Army 3612 Cuming Street Omaha, NE 68131-1900 Purpose: Area Christian outreach work		$ 2,500
(6) The Salvation Army PO Box 249 Ottumwa, IA 52501-0249 Purpose: Local Christian outreach work		$ 3,000
(7) LOVE, Inc PO Box 213 Oskaloosa, IA 52577 Purpose: Local missions		$ 1,500

(8) Ecumenical Cupboard $ 2,000
201 N Market
Oskaloosa, IA 52577

Purpose: Food relief

(9) Ottumwa Community Outreach Ministry $ 3,000
325 East Main
Ottumwa, IA 52501

Purpose: Homeless men's shelter project

(10) God's Kids $ 3,000
12925 Marlay Ave
Fontana, CA 92337

Purpose: Orphanage(s) with greatest need

(11) Habitat for Humanity $ 3,000
PO Box 583
Oskaloosa, IA 52577

Purpose: Local project

(12) Child Evangelism Fellowship $ 2,000
PO Box 652
Oskaloosa, IA 52577

Purpose: Children ministries

(13) Food for the Hungry $ 3,000
1224 Washington Street
Phoenix, AZ 85034

Purpose: Feeding programs

(14) Prison Fellowship $ 4,000
PO Box 1550
Merrifield, VA 22116-1550

Purpose: Prison ministries

(15) RBC Ministries $ 2,000
3000 Kraft Ave SE
Grand Rapids, MI 49512

Purpose: Christian ministries

(16) Crisis Intervention Services $ 500
500 High Ave West
Oskaloosa, IA 52577

Purpose: Women's/Children's Shelter

(17) Doctors Without Boarders 333 Seventh Ave, 2nd Floor New York, NY 10001	$	1,500

Purpose: Children Medical Surgeries

(18) The Smile Train 41 Madison Ave, 28th Floor New York, NY 10010	$	2,500

Purpose: Medical projects

(19) Hope Ministries PO Box 862 Des Moines, IA 50304-0862	$	3,000

Purpose: Christian Outreach Programs

(20) Alzheimer's Association Greater Iowa Chapter 1730 28th Street West Des Moines, IA 50266-1436	$	1,000

Purpose: Research work

(21) National Parkinson Foundation, Inc. Office of Development 1501 NW 9th Ave/Bob Hope Road Miami, FL 33136-1494	$	1,000

Purpose: Research work

(22) Hopewell Church 10400 Echo Avenue Blakesburg, IA 52536	$	4,000

Purpose: Christian ministries

(23) University of Iowa Foundation Levitt Center for University Advancement One West Park Road, PO Box 4550 Iowa City, IA 52244-4550	$	1,000

Purpose: Holden Comprehensive Cancer Center

(24) Christain Appalachian Project PO Box 55911 Lexington, KY 40555-5911	$	1,000

Purpose: Care for the Poor

(25) Blank Children's Hospital 1200 Pleasant Street Des Moines, IA 50309 Purpose: Children's Hospital Care		$ 1,145
(26) Billy Graham Evangelistic Association 1 Billy Graham Parkway Des Moines, IA 50309 Charlotte, NC 28201-0001 Purpose: Christian Ministries		$ 5,000
(27) Food Bank of Southern Iowa, Inc. PO Box 1294 705 West Main Ottumwa, IA 52501 Purpose: Food Relief		$ 1,000
(28) The Salvation Army PO Box 487 Oskaloosa, IA 52577 Purpose: Christian Outreach Work		$ 1,000
(29) Christian Broad Casting Network 977 Centerville Turnpike Virginia Beach, VA 23463 Purpose: Christian Ministries		$ 2,000
(30) Gospel For Asia 1800 Golden Trail Court Carrollton, TX 75010-4649 Purpose: Asian Missinonary Outreach		$ 2,000
(31) World Christian Broadcasting 605 Bradley Ct. Franklin, TN 37067 Purpose: Broadcasting Christian The Good News of Jesus Christ		$ 2,000
	Totals	$ 75,645

STM120

Federal Supporting Statements | 2012 PG 01

Name(s) as shown on return: JAMES & MARIE MCCURDY FAMILY

FEIN: 42-6468384

FORM 990PF, PART II, LINE 15
OTHER ASSETS SCHEDULE

STATEMENT #120

DESCRIPTION	BOY BOOK	EOY BOOK	FMV
CORP DIVIDEND RECEIVABLE	841	1,585	1,585
TOTAL	841	1,585	1,585

STM137

PG 01

FORM 990PF, PART II, LINE 10(B)
INVESTMENTS: CORPORATE STOCK SCHEDULE

STATEMENT #137

CATEGORY	BOY	BOOK VALUE	EOY FMV
MORGAN STANLEY MUTUAL FUNDS	575,611	592,556	612,283
EDWARD JONES STOCK MUT FDS	709,037	891,253	997,818
TOTALS	1,284,648	1,483,809	1,610,101

Federal Supporting Statements

2012 PG 01

Name(s) as shown on return: JAMES & MARIE MCCURDY FAMILY

Your Social Security Number: 42-6468384

FORM 990PF, PART I, LINE 11 - OTHER INCOME SCHEDULE

STATEMENT #106

DESCRIPTION	REVENUE AND EXPENSES	NET INVESTMENT	ADJUSTED NET INCOME
REFUNDS	85	85	85
TOTALS	85	85	85

PG 01
STATEMENT #108

FORM 990PF, PART I, LINE 16(B) - ACCOUNTING FEES SCHEDULE

DESCRIPTION	REVENUE AND EXPENSES	NET INVESTMENT	ADJUSTED NET INCOME	CHARITABLE PURPOSE
ACCOUNTING FEES	950	950	950	0
TOTALS	950	950	950	0

PG 01
STATEMENT #109

FORM 990PF, PART I, LINE 16(C) - OTHER PROFESSIONAL FEES SCHEDULE

DESCRIPTION	REVENUE AND EXPENSES	NET INVESTMENT	ADJUSTED NET INCOME	CHARITABLE PURPOSE
INVESTMENT FEES	14,914	14,914	14,914	0
TOTALS	14,914	14,914	14,914	0

Federal Supporting Statements

2012 PG 01

Name(s) as shown on return: JAMES & MARIE MCCURDY FAMILY

Your Social Security Number: 42-6468384

FORM 990PF, PART I, LINE 18 - TAXES SCHEDULE

STATEMENT #110

DESCRIPTION	REVENUE AND EXPENSES	NET INVESTMENT	ADJUSTED NET INCOME	CHARITABLE PURPOSE
US TREAS FED TAX	487	0	0	0
FOREIGN TAX	413	413	413	0
TOTALS	900	413	413	0

990 **Overflow Statement** 2012

Page 1

Name(s) as shown on return	FEIN
JAMES & MARIE MCCURDY FAMILY	42-6468384

FORM 990PF PART 1 LINE 1 CONTRIBUTIONS

Description	Amount
CARGILL	$ 3,110
Total:	$ 3,110

Form **8868**
(Rev January 2013)
Department of the Treasury
Internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return

▶ **File a separate application for each return.**

OMB No 1545-1709

- If you are filing for an **Automatic 3-Month Extension, complete only Part I** and check this box . . . . ▶ ☒
- If you are filing for an **Additional (Not Automatic) 3-Month Extension, complete only Part II** (on page 2 of this form)

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868

Electronic filing (e-file). You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions) For more details on the electronic filing of this form, visit www irs gov/efile and click on e-file for Charities & Nonprofits

Part I Automatic 3-Month Extension of Time. Only submit original (no copies needed)

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete Part I only . . . . ▶ ☐

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns

Enter filer's identifying number, see instructions

Type or print	Name of exempt organization or other filer, see instructions JAMES & MARIE MCCURDY FAMILY	Employer identification number (EIN) or 42-6468384
File by the due date for filing your return See instructions	Number, street, and room or suite no If a P.O box, see instructions PO BOX 222	Social security number (SSN)
	City, town or post office, state, and ZIP code For a foreign address, see instructions FREMONT, IA 52561-0222	

Enter the Return code for the return that this application is for (file a separate application for each return) 0 4

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

- The books are in the care of ▶ LARRY L MCCURDY P O BOX 222 FREMONT, IA 52561

Telephone No ▶ 641-933-4352 FAX No ▶

- If the organization does not have an office or place of business in the United States, check this box . . . . ▶ ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ______ . If this is for the whole group, check this box . . . . ▶ ☐ If it is for part of the group, check this box . . . ▶ ☐ and attach a list with the names and EINs of all members the extension is for

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until 08-15 , 20 13 , to file the exempt organization return for the organization named above The extension is for the organization's return for

▶ ☒ calendar year 20 12 or

▶ ☐ tax year beginning ______, 20 ___, and ending ______, 20 ___.

2 If the tax year entered in line 1 is for less than 12 months, check reason: ☐ Initial return ☐ Final return ☐ Change in accounting period

3a	If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits See instructions	3a	$ 719
b	If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made Include any prior year overpayment allowed as a credit	3b	$ 0
c	**Balance due.** Subtract line 3b from line 3a Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions	3c	$ 719

Caution. If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions

For Privacy Act and Paperwork Reduction Act Notice, see Instructions. Form **8868** (Rev 1-2013)

EEA