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 , and ending

Name of foundation JUBITZ FAMILY FOUNDATION	**A Employer identification number** 93-1324016
Number and street (or P O box number if mail is not delivered to street address): 221 N.W. SECOND AVENUE Room/suite: 210	**B** Telephone number (503) 274-6255
City or town, state, and ZIP code PORTLAND, OR 97209	**C** If exemption application is pending, check here ▶ ☐
G Check all that apply: ☐ Initial return ☐ 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)* ▶$ 12,594,716. **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).)

			(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	20,000.		N/A	
	2	Check ▶ ☐ if the foundation is not required to attach Sch B				
	3	Interest on savings and temporary cash investments	703.	703.		STATEMENT 1
	4	Dividends and interest from securities	349,525.	349,525.		STATEMENT 2
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	-29,838.			
	b	Gross sales price for all assets on line 6a 1,293,127.				
	7	Capital gain net income (from Part IV, line 2)		0.		
	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)				
	11	Other income	10,000.	0.		STATEMENT 3
	12	**Total** Add lines 1 through 11	350,390.	350,228.		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	88,000.	17,600.		70,400.
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits	13,256.	2,651.		10,605.
	16a	Legal fees STMT 4	120.	0.		120.
	b	Accounting fees STMT 5	3,043.	0.		3,043.
	c	Other professional fees STMT 6	90,467.	48,635.		41,832.
	17	Interest				
	18	Taxes STMT 7	5,669.	0.		0.
	19	Depreciation and depletion				
	20	Occupancy	8,994.	1,799.		7,195.
	21	Travel, conferences, and meetings	20,252.	2,275.		17,977.
	22	Printing and publications	7,616.	51.		7,565.
	23	Other expenses STMT 8	16,248.	1,758.		14,490.
	24	**Total operating and administrative expenses.** Add lines 13 through 23	253,665.	74,769.		173,227.
	25	Contributions, gifts, grants paid	504,900.			494,200.
	26	**Total expenses and disbursements.** Add lines 24 and 25	758,565.	74,769.		667,427.
	27	Subtract line 26 from line 12:				
	a	Excess of revenue over expenses and disbursements	-408,175.			
	b	**Net investment income** (if negative, enter -0-)		275,459.		
	c	**Adjusted net income** (if negative, enter -0-)			N/A	

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

			Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing			
	2	Savings and temporary cash investments	111,140.	120,092.	120,092.
	3	Accounts receivable ▶ Less: allowance for doubtful accounts ▶			
	4	Pledges receivable ▶ Less: allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons			
	7	Other notes and loans receivable ▶ Less: allowance for doubtful accounts ▶			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments - U.S. and state government obligations			
	b	Investments - corporate stock STMT 10	4,708,538.	5,250,528.	5,250,528.
	c	Investments - corporate bonds STMT 11	4,170,068.	3,988,742.	3,988,742.
	11	Investments - land, buildings, and equipment. basis ▶ Less accumulated depreciation ▶			
	12	Investments - mortgage loans			
	13	Investments - other STMT 12	3,127,303.	3,235,354.	3,235,354.
	14	Land, buildings, and equipment: basis ▶ Less accumulated depreciation ▶			
	15	Other assets (describe ▶)			
	16	**Total assets** (to be completed by all filers)	12,117,049.	12,594,716.	12,594,716.
Liabilities	17	Accounts payable and accrued expenses	4,908.	4,324.	
	18	Grants payable	20,000.	30,700.	
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable			
	22	Other liabilities (describe ▶)			
	23	**Total liabilities** (add lines 17 through 22)	24,908.	35,024.	
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	12,092,141.	12,559,692.	
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☐ and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg., and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	**Total net assets or fund balances**	12,092,141.	12,559,692.	
	31	**Total liabilities and net assets/fund balances**	12,117,049.	12,594,716.	

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	12,092,141.
2	Enter amount from Part I, line 27a	2	-408,175.
3	Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 9	3	875,726.
4	Add lines 1, 2, and 3	4	12,559,692.
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	12,559,692.

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	PUBLICLY TRADED SECURITIES	P		
b				
c				
d				
e				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	1,293,127.		1,322,965.	-29,838.
b				
c				
d				
e				

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

	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a				-29,838.
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	-29,838.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8	3	N/A

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

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

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

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

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

1 Enter the appropriate amount in each column for each year; see 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	688,089.	12,608,342.	.054574
2010	689,298.	12,215,005.	.056430
2009	660,766.	11,247,031.	.058750
2008	965,806.	13,503,373.	.071523
2007	1,097,480.	14,195,787.	.077310

2 Total of line 1, column (d)	2	.318587
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	.063717
4 Enter the net value of noncharitable-use assets for 2012 from Part X, line 5	4	12,154,136.
5 Multiply line 4 by line 3	5	774,425.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	2,755.
7 Add lines 5 and 6	7	777,180.
8 Enter qualifying distributions from Part XII, line 4	8	667,427.

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 ▶ ☐ and enter 1% of Part I, line 27b			1	5,509.
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).				
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			2	0.
3	Add lines 1 and 2			3	5,509.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			4	0.
5	**Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter -0-			5	5,509.
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			
d	Backup withholding erroneously withheld	6d			
7	Total credits and payments. Add lines 6a through 6d			7	0.
8	Enter any **penalty** for underpayment of estimated tax. Check here ☒ if Form 2220 is attached			8	123.
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶			9	5,632.
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 instructions for definition)? *If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.*	1b		X
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. ▶ $ 0. **(2)** On foundation managers. ▶ $ 0.			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ 0.			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities.*	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? N/A	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		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) ▶ 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	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 ▶ WWW.JUBITZFF.ORG

14 The books are in care of ▶ THE FOUNDATION Telephone no. ▶ (503) 274-6255

Located at ▶ 221 N.W. SECOND AVENUE, SUITE 210, PORTLAND, OR ZIP+4 ▶ 97209

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

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

			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

			Yes	No
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			
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		X
	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.) N/A	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. ▶ ____, ____, ____, ____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 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.)* N/A	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2012?	4b		X

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

5a During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? ☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)? N/A **5b**

Organizations relying on a current notice regarding disaster assistance check here ▶ ☐

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? N/A ☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53 4945-5(d).

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

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b** No: X

If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? N/A **7b**

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

1 List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 13		88,000.	6,000.	0.

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

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

Total number of other employees paid over $50,000 ▶ 0

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Part VIII **Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors** *(continued)*

3 Five highest-paid independent contractors for professional services. 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 SEE STATEMENT 14	64,548.
2	
3	
4	

Part IX-B **Summary of Program-Related Investments**

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 N/A	
2	
All other program-related investments. See instructions. 3	
Total. Add lines 1 through 3 ▶	0.

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:				
a	Average monthly fair market value of securities			1a	12,204,347.
b	Average of monthly cash balances			1b	134,877.
c	Fair market value of all other assets			1c	
d	**Total** (add lines 1a, b, and c)			1d	12,339,224.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.		
2	Acquisition indebtedness applicable to line 1 assets			2	0.
3	Subtract line 2 from line 1d			3	12,339,224.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)			4	185,088.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4			5	12,154,136.
6	**Minimum investment return.** Enter 5% of line 5			6	607,707.

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	607,707.
2a	Tax on investment income for 2012 from Part VI, line 5	2a	5,509.		
b	Income tax for 2012. (This does not include the tax from Part VI.)	2b			
c	Add lines 2a and 2b			2c	5,509.
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	602,198.
4	Recoveries of amounts treated as qualifying distributions			4	10,000.
5	Add lines 3 and 4			5	612,198.
6	Deduction from distributable amount (see instructions)			6	0.
7	**Distributable amount** as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1			7	612,198.

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	667,427.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	667,427.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	667,427.

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				612,198.
2 Undistributed income, if any, as of the end of 2012				
a Enter amount for 2011 only			0.	
b Total for prior years: _____, _____, _____		0.		
3 Excess distributions carryover, if any, to 2012:				
a From 2007 442,073.				
b From 2008 303,375.				
c From 2009 104,089.				
d From 2010 85,158.				
e From 2011 63,206.				
f **Total** of lines 3a through e	997,901.			
4 Qualifying distributions for 2012 from Part XII, line 4: ▶ $ 667,427.				
a Applied to 2011, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2012 distributable amount				612,198.
e Remaining amount distributed out of corpus	55,229.			
5 Excess distributions carryover applied to 2012 (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	1,053,130.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2011. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2012. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2013				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2007 not applied on line 5 or line 7	442,073.			
9 **Excess distributions carryover to 2013.** Subtract lines 7 and 8 from line 6a	611,057.			
10 Analysis of line 9:				
a Excess from 2008 303,375.				
b Excess from 2009 104,089.				
c Excess from 2010 85,158.				
d Excess from 2011 63,206.				
e Excess from 2012 55,229.				

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

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

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

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

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

1 **Information Regarding Foundation Managers:**

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

M. ALBIN JUBITZ, JR.

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

NONE

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

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

a The name, address, and telephone number or e-mail of the person to whom applications should be addressed: SEE STATEMENT 16

SEE STATEMENT 15

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*				
ADELANTE MUJERES FOREST GROVE, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
AMERICAN RIVERS NW REGIONAL OFFICE WASHINGTON, DC	NONE	509(A)	GENERAL OPERATIONS	5,000.
BAKER COUNTY CASA BAKER CITY, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
BARK PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	6,000.
BLACK PARTENT INITIATIVE PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
Total SEE CONTINUATION SHEET(S)			▶ 3a	494,200.
b *Approved for future payment*				
CENTER FOR ENVIRONMENTAL EQUITY PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	3,200.
CHEHALEM YOUTH & FAMILY SERVICES NEWBERG, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
KIDS INTERVENTION & DIAGNOSTIC SERVICE CT BEND, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
Total SEE CONTINUATION SHEET(S)			▶ 3b	30,700.

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
	(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	703.	
4 Dividends and interest from securities			14	349,525.	
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	-29,838.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a REFUND OF GRANTS AWARDED			01	10,000.	
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)		0.		330,390.	0.

13 **Total** Add line 12, columns (b), (d), and (e) 13 330,390.

(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).

Form 990-PF (2012) **JUBITZ FAMILY FOUNDATION** 93-1324016 Page 13

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.

Signature of officer or trustee 5/7/13 Date Pres Title

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

Paid Preparer Use Only

Print/Type preparer's name GARY MCGEE	Preparer's signature	Date 5/3/13	Check ☐ if self-employed	PTIN P00743279
Firm's name ▶ GARY MCGEE & CO. LLP			Firm's EIN ▶	
Firm's address ▶ 808 S.W. THIRD AVENUE, SUITE 700 PORTLAND, OR 97204			Phone no. (503) 222-2515	

Schedule B
(Form 990, 990-EZ, or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.

OMB No 1545-0047

2012

Name of the organization
JUBITZ FAMILY FOUNDATION

Employer identification number
93-1324016

Organization type (check one)·

Filers of:	**Section:**
Form 990 or 990-EZ	☐ 501(c)( ) (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
	☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule.**
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions

General Rule

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

Special Rules

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

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than $1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals Complete Parts I, II, and III

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc , purposes, but these contributions did not total to more than $1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc , purpose Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc , contributions of $5,000 or more during the year ▶ $ ____________

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

Name of organization	Employer identification number
JUBITZ FAMILY FOUNDATION	93-1324016

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	M. ALBIN JUBITZ, JR. 221 N.W. SECOND AVENUE, SUITE 210 PORTLAND, OR 97209	$ 10,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
2	MIKE CARUSO 176 S.W. HEMLOCK STREET NEWBERG, OR 97115	$ 10,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)

Name of organization	Employer identification number
JUBITZ FAMILY FOUNDATION	93-1324016

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

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

Name of organization	Employer identification number
JUBITZ FAMILY FOUNDATION	93-1324016

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

Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

Part XV **Supplementary Information**

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
BOYS AND GIRLS CLUB - WESTERN LANE COUNTY FLORENCE, OR	NONE	509(A)	GENERAL OPERATIONS	2,500.
BOYS AND GIRLS CLUBS OF CENTRAL OREGON BEND, OR	NONE	509(A)	GENERAL OPERATIONS	3,000.
CAMP FIRE COLUMBIA PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
CAPE HORN CONSERVANCY WASHOUGAL, WA	NONE	509(A)	GENERAL OPERATIONS	2,000.
CASA FOR CHILDREN PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
CASA OF LANE CO. SPRINGFIELD, OR	NONE	509(A)	GENERAL OPERATIONS	2,500.
CENTER FOR EARTH LEADERSHIP PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
CENTER FOR ENVIRONMENTAL EQUITY PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	3,200.
CHEHALEM YOUTH & FAMILY SERVICES NEWBERG, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
CHILD ADVOCATES, INC. OREGON CITY, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
Total from continuation sheets				468,200.

Part XV **Supplementary Information**

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
CHILDREN'S ADVOCACY CTR. OF JACKSON CO. MEDFORD, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
CHILDREN'S CENTER OREGON CITY, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
CHILDREN'S INSTITUTE PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	10,000.
CHILDREN'S JUSTICE ALLIANCE PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
CHILDREN'S MUSEUM OF EAST. OREGON PENDELTON, OR	NONE	509(A)	GENERAL OPERATIONS	3,000.
COLUMBIA SLOUGH WATERSHED COUNCIL PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
COMMONWAY INSTITUTE PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	10,000.
COMMUNITY ALLIANCE OF LANE CO. EUGENE, OR	NONE	509(A)	GENERAL OPERATIONS	10,000.
COMMUNITY TRANSITIONAL SCHOOL PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	7,500.
COOS-DOUGLAS NEIGHBOR TO NEIGHBOR NORTH BEND, OR	NONE	509(A)	GENERAL OPERATIONS	2,000.
Total from continuation sheets				

Part XV **Supplementary Information**

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
CORBETT SCHOOL DISTRICT CORBETT, OR	NONE	509(A)	GENERAL OPERATIONS	2,500.
CRAG LAW CENTER PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
DESCHUTES RIVER CONSERVANCY BEND, OR	NONE	509(A)	GENERAL OPERATIONS	7,500.
ELEVATE OREGON PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
EPIPHANY SCHOOL DORCHESTER, MA	NONE	509(A)	GENERAL OPERATIONS	5,000.
FAMILIES FIRST PARENT RESOURCE CENTER JOHN DAY, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
FAMILY BUILDING BLOCKS SALEM, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
FAMILY RELIEF NURSERY COTTAGE GROVE, OR	NONE	509(A)	GENERAL OPERATIONS	7,500.
FRIENDS OF THE CHILDREN - PORTLAND PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
GEOS INSTITUTE ASHLAND, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
Total from continuation sheets				

Part XV **Supplementary Information**

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
GONZAGA UNIV. INSTITUE FOR HATE STUDIES SPOKANE, WA	NONE	509(A)	GENERAL OPERATIONS	2,000.
HELLS CANYON PRES. COUNCIL LA GRANDE, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
INSTITUTE FOR APPLIED ECOLOGY CORVALLIS, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
INSTITUTE FOR MULTI-TRACK DIPLOMACY ARLINGTON, VA	NONE	509(A)	GENERAL OPERATIONS	5,000.
KIDS INTERVENTION & DIAGNOSTIC SERVICE CT BEND, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
KLAMATH LAKE LAND TRUST KLAMATH FALLS, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
KS WILD ASHLAND, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
LATINO NETWORK PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	7,500.
LIBERTY HOUSE SALEM, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
LUTHERAN COMMUNITY SERVICE NW BEAVERTON, OR	NONE	509(A)	GENERAL OPERATIONS	6,000.
Total from continuation sheets				

Part XV **Supplementary Information**

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
MASLOW PROJECT MEDFORD, OR	NONE	509(A)	GENERAL OPERATIONS	10,000.
MEDIATION WORKS MEDFORD, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
MERCY CORPS ACTION CENTER PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
METROPOLITAN FAMILY SERVICES PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	7,500.
MORRISON CHILD & FAMILY SERVICES' PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	15,000.
NATIVE FISH SOCIETY OREGON CITY, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
NEIGHBORHOOD HOUSE PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
NEIGHBORS FOR KIDS DEPOE BAY, OR	NONE	509(A)	GENERAL OPERATIONS	2,500.
NORTHWEST EARTH INSTITUTE PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
NORTHWEST OUTWARD BOUND SCHOOL PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	18,000.
Total from continuation sheets				

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
OPEN MEADOW ALTERNATIVE SCHOOL PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	10,000.
OR PHYSICIANS FOR SOCIAL RESPONSIBILITY PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
OREGON ENVIRONMENTAL COUNCIL PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
OREGON NATURAL DESERT ASSOCIATION BEND, OR	NONE	509(A)	GENERAL OPERATIONS	10,000.
OREGON PEACE INSTITUTE PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	15,000.
OREGON WILD PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
PARENTING NOW EUGENE, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
PEACE VILLAGE LINCOLN CITY, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
PEARL BUCK CENTER EUGENE, OR	NONE	509(A)	GENERAL OPERATIONS	2,500.
PORTLAND CHILDREN'S MUSEUM PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	7,500.
Total from continuation sheets				

Part XV **Supplementary Information**

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
PORTLAND OIC PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	3,000.
RESOLUTIONS NORTHWEST PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
ROTARY DISTRICT 5100 WILSONVILLE, OR	NONE	509(A)	GENERAL OPERATIONS	20,000.
SAVING GRACE BEND, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
SISTERS PARK & REC DISTRICT SISTERS, OR	NONE	509(A)	GENERAL OPERATIONS	2,500.
SMART PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	8,000.
SPEARFISH FOUNDATION PUBLIC ED SPEARFISH, SD	NONE	509(A)	GENERAL OPERATIONS	10,000.
THE CHILDRENS BOOK BANK PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	2,500.
THE NEXT DOOR, INC. HOOD RIVER, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
TILLAMOOK SCHOOL DISTRICT #9 FOUNDATION TILLAMOOK, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
Total from continuation sheets				

Part XV **Supplementary Information**

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
TREASURE VALLEY RELIEF NURSERY ONTARIO, OR	NONE	509(A)	GENERAL OPERATIONS	3,000.
UO FOUNDATION EUGENE, OR	NONE	509(A)	GENERAL OPERATIONS	17,500.
VOLUNTEERS OF AMERICA PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
WATERWATCH OF OREGON PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
WESTERN ENVIRONMENTAL LAW CENTER EUGENE, OR	NONE	509(A)	GENERAL OPERATIONS	10,000.
WILD SALMON CENTER PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	10,000.
Total from continuation sheets				

Part XV Supplementary Information

3 Grants and Contributions Approved for Future Payment (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
KLAMATH LAKE LAND TRUST KLAMATH FALLS, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
PORTLAND STATE UNIVERSITY PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	12,500.
Total from continuation sheets				17,500.

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

SOURCE	AMOUNT
CD INTEREST - ALBINA COMMUNITY BANK	677.
CHECKING INTEREST - ALBINA COMMUNITY BANK	26.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	703.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
DIVIDEND INCOME - U.S. TRUST	320,808.	0.	320,808.
INTEREST INCOME - U.S. TRUST	28,717.	0.	28,717.
TOTAL TO FM 990-PF, PART I, LN 4	349,525.	0.	349,525.

FORM 990-PF OTHER INCOME STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME
REFUND OF GRANTS AWARDED	10,000.	0.	
TOTAL TO FORM 990-PF, PART I, LINE 11	10,000.	0.	

FORM 990-PF LEGAL FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
CAROLYN W. MILLER, PC - LEGAL SERVICES	120.	0.		120.
TO FM 990-PF, PG 1, LN 16A	120.	0.		120.

FORM 990-PF ACCOUNTING FEES STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
GARY MCGEE & CO. - TAX SERVICES	3,043.	0.		3,043.
TO FORM 990-PF, PG 1, LN 16B	3,043.	0.		3,043.

FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
U.S. TRUST - INVESTMENT MGMT. FEES	48,635.	48,635.		0.
PATRICK HILLER - WAR PREVENTION INITIATIVE CONSULTING	25,556.	0.		25,556.
ERIN K. THOMAS - WAR PREVENTION INITIATIVE CONSULTING	12,460.	0.		12,460.
OTHER WAR PREVENTION INITIATIVE CONSULTANTS	3,816.	0.		3,816.
TO FORM 990-PF, PG 1, LN 16C	90,467.	48,635.		41,832.

FORM 990-PF TAXES STATEMENT 7

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
EXCISE TAX ON INVESTMENT INCOME	5,669.	0.		0.
TO FORM 990-PF, PG 1, LN 18	5,669.	0.		0.

FORM 990-PF OTHER EXPENSES STATEMENT 8

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INTERNET	681.	99.		582.
TELEPHONE	1,554.	311.		1,243.
LICENSES AND PERMITS	300.	60.		240.
POSTAGE AND DELIVERY	26.	5.		21.
OFFICE SUPPLIES	269.	54.		215.
OTHER	305.	61.		244.
PROGRAM EXPENSES	6,172.	0.		6,172.
DUES AND SUBSCRIPTIONS	2,375.	475.		1,900.
COMPUTER/WEBSITE	3,466.	693.		2,773.
OREGON CHARITY REGISTRATION FEES	1,100.	0.		1,100.
TO FORM 990-PF, PG 1, LN 23	16,248.	1,758.		14,490.

FORM 990-PF OTHER INCREASES IN NET ASSETS OR FUND BALANCES STATEMENT 9

DESCRIPTION	AMOUNT
NET INCREASE IN THE FAIR VALUE OF INVESTMENTS	875,726.
TOTAL TO FORM 990-PF, PART III, LINE 3	875,726.

FORM 990-PF CORPORATE STOCK STATEMENT 10

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
EQUITY SECURITIES	5,250,528.	5,250,528.
TOTAL TO FORM 990-PF, PART II, LINE 10B	5,250,528.	5,250,528.

FORM 990-PF CORPORATE BONDS STATEMENT 11

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
FIXED INCOME SECURITIES	3,988,742.	3,988,742.
TOTAL TO FORM 990-PF, PART II, LINE 10C	3,988,742.	3,988,742.

FORM 990-PF OTHER INVESTMENTS STATEMENT 12

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
OTHER SECURITIES	FMV	148,199.	148,199.
CASH EQUIVALENTS	FMV	460,066.	460,066.
REAL ESTATE/ALTERNATIVE INVESTMENTS	COST	2,627,089.	2,627,089.
TOTAL TO FORM 990-PF, PART II, LINE 13		3,235,354.	3,235,354.

FORM 990-PF PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS STATEMENT 13

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
M. ALBIN JUBITZ, JR. 221 N.W. SECOND AVENUE, SUITE 210 PORTLAND, OR 97209	PRESIDENT 10.00	0.	0.	0.
ELIZABETH JUBITZ SAYLER 221 N.W. SECOND AVENUE, SUITE 210 PORTLAND, OR 97209	VICE PRESIDENT 2.00	0.	0.	0.
SARAH C. JUBITZ 221 N.W. SECOND AVENUE, SUITE 210 PORTLAND, OR 97209	TREASURER 2.00	0.	0.	0.
KATHERINE H. JUBITZ 221 N.W. SECOND AVENUE, SUITE 210 PORTLAND, OR 97209	SECRETARY 2.00	0.	0.	0.
RAYMOND G. JUBITZ 221 N.W. SECOND AVENUE, SUITE 210 PORTLAND, OR 97209	EXEC. DIRECTOR 40.00	88,000.	6,000.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		88,000.	6,000.	0.

FORM 990-PF SUMMARY OF DIRECT CHARITABLE ACTIVITIES STATEMENT 14

ACTIVITY ONE

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

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

	EXPENSES
TO FORM 990-PF, PART IX-A, LINE 1	64,548.

FORM 990-PF GRANT APPLICATION SUBMISSION INFORMATION STATEMENT 15
PART XV, LINES 2A THROUGH 2D

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

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

TELEPHONE NUMBER

(503) 274-6255

FORM AND CONTENT OF APPLICATIONS

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

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

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

ANY SUBMISSION DEADLINES

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

RESTRICTIONS AND LIMITATIONS ON AWARDS

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

FORM 990-PF GRANT APPLICATION SUBMISSION INFORMATION STATEMENT 16
PART XV, LINES 2A - 2D (CONTINUATION)

FORM AND CONTENT OF APPLICATIONS

ORGANIZATION'S IRS DETERMINATION LETTER; AND THE ORGANIZATION'S MOST CURRENT FINANCIAL STATEMENTS AND 990.

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.

Type or print File by the due date for filing your return See instructions	Name of exempt organization or other filer, see instructions JUBITZ FAMILY FOUNDATION	Employer identification number (EIN) or 93-1324016
	Number, street, and room or suite no. If a P O. box, see instructions. 221 N.W. SECOND AVENUE, NO. 210	Social security number (SSN)
	City, town or post office, state, and ZIP code For a foreign address, see instructions PORTLAND, OR 97209	

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 ▶ THE FOUNDATION 221 N.W. SECOND AVENUE, SUITE 210 - PORTLAND, OR 97209
  Telephone No. ▶ (503) 274-6255 FAX No ▶ (503) 274-6256
- 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 AUGUST 15, 2013 , to file the exempt organization return for the organization named above The extension is for the organization's return for:
▶ ☒ calendar year 2012 or
▶ ☐ tax year beginning ______________ , and ending ______________ .

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	$ 5,509.
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	$ 5,509.

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

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