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Form **990-PF**Department of the Treasury
Internal Revenue Service**Return of Private Foundation**
or Section 4947(a)(1) Nonexempt Charitable Trust
Treated as a Private Foundation

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

OMB No 1545-0052

2012

Open to public inspection

For calendar year 2012 or tax year beginning **JUN 1, 2012**, and ending **MAY 31, 2013**

Name of foundation WEST FAMILY FOUNDATION		A Employer identification number 20-4720365
Number and street (or P.O. box number if mail is not delivered to street address) 680 G STREET, SUITE B		B Telephone number 541-899-9976
City or town, state, and ZIP code JACKSONVILLE, OR 97530		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 8,800,160. (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 <input type="checkbox"/>
J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____		

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities		251,838.	251,838.		STATEMENT 1
5a Gross rents		11,427.	11,427.		STATEMENT 2
b Net rental income or (loss) 11,427.					
6a Net gain or (loss) from sale of assets not on line 10		6,608.			
b Gross sales price for all assets on line 6a 1,394,178.					
7 Capital gain net income (from Part IV, line 2)			6,608.		
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					
12 Total. Add lines 1 through 11		269,873.	269,873.		
13 Compensation of officers, directors, trustees, etc		0.	0.		0.
14 Other employee salaries and wages		34,271.	0.		34,271.
15 Pension plans, employee benefits		1,192.	0.		1,192.
16a Legal fees STMT 3		2,711.	0.		2,711.
b Accounting fees STMT 4		4,376.	1,993.		2,383.
c Other professional fees STMT 5		93,441.	93,441.		0.
17 Interest					
18 Taxes STMT 6		3,321.	0.		3,321.
19 Depreciation and depletion					
20 Occupancy		6,769.	0.		6,769.
21 Travel, conferences, and meetings		312.	0.		312.
22 Printing and publications					
23 Other expenses STMT 7		18,636.	0.		18,636.
24 Total operating and administrative expenses. Add lines 13 through 23		165,029.	95,434.		69,595.
25 Contributions, gifts, grants paid		339,420.			339,420.
26 Total expenses and disbursements. Add lines 24 and 25		504,449.	95,434.		409,015.
27 Subtract line 26 from line 12		-234,576.			
a Excess of revenue over expenses and disbursements			174,439.		
b Net investment income (if negative, enter -0-)					
c Adjusted net income (if negative, enter -0-)				N/A	

Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	121,645.	190,485.	190,485.
	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	2,461.	2,461.	2,461.
	10a Investments - U S and state government obligations			
	b Investments - corporate stock STMT 8	8,372,578.	8,093,948.	8,403,530.
	c Investments - corporate bonds			
Liabilities	11 Investments - land, buildings, and equipment basis ▶			
	Less: accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other			
	14 Land, buildings, and equipment basis ▶			
	Less: accumulated depreciation ▶			
	15 Other assets (describe ▶ STATEMENT 9)	210,528.	203,684.	203,684.
	16 Total assets (to be completed by all filers)	8,707,212.	8,490,578.	8,800,160.
	17 Accounts payable and accrued expenses			
	18 Grants payable			
Net Assets or Fund Balances	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶ STATEMENT 10)	946.	18,888.	
23 Total liabilities (add lines 17 through 22)	946.	18,888.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>			
	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 ▶ <input checked="" type="checkbox"/>			
	and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	0.	0.	
28 Paid-in or capital surplus, or land, bldg, and equipment fund	0.	0.		
29 Retained earnings, accumulated income, endowment, or other funds	8,706,266.	8,471,690.		
30 Total net assets or fund balances	8,706,266.	8,471,690.		
31 Total liabilities and net assets/fund balances	8,707,212.	8,490,578.		

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	8,706,266.
2 Enter amount from Part I, line 27a	2	-234,576.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	8,471,690.
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	8,471,690.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	SEE ATTACHED SCHEDULE #814	P		
b	SEE ATTACHED SCHEDULE #814	P		
c	SEE ATTACHED SCHEDULE #339	P		
d	SEE ATTACHED SCHEDULE #339	P		
e	SEE ATTACHED SCHEDULE #344	P		

(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 184,843.		157,558.	27,285.
b 72,033.		58,061.	13,972.
c 162,880.		137,982.	24,898.
d 514,662.		417,902.	96,760.
e 459,760.		616,067.	-156,307.

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a			27,285.
b			13,972.
c			24,898.
d			96,760.
e			-156,307.

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	6,608.
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	418,275.	7,963,463.	.052524
2010	377,307.	8,115,167.	.046494
2009	396,525.	7,776,288.	.050992
2008	432,945.	7,439,816.	.058193
2007	570,546.	10,250,202.	.055662

2 Total of line 1, column (d)	2	.263865
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	.052773
4 Enter the net value of noncharitable-use assets for 2012 from Part X, line 5	4	8,187,721.
5 Multiply line 4 by line 3	5	432,091.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	1,744.
7 Add lines 5 and 6	7	433,835.
8 Enter qualifying distributions from Part XII, line 4	8	409,015.

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 <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary-see instructions)		
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b	1	3,489.
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	3,489.
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	3,489.
6 Credits/Payments		
a 2012 estimated tax payments and 2011 overpayment credited to 2012	6a	1,840.
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	1,840.
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> 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	1,649.
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 <input type="checkbox"/> Refunded <input type="checkbox"/>	11	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
1c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation <input type="checkbox"/> \$ 0. (2) On foundation managers <input type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> OR		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2012 or the taxable year beginning in 2012 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address WWW.FAMILYFOUNDATIONWEST.ORG	13	X	
14	The books are in care of CARRIE HANSON, EXECUTIVE DIRECTOR Telephone no 541-899-9976 Located at 680 G STREET, SUITE B, JACKSONVILLE, OR ZIP+4 97530			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year	15	N/A	
16	At any time during calendar year 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? See the instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes," enter the name of the foreign country	16	Yes	No
				X

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here		X
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2012?		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? If "Yes," list the years	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions)	N/A	
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?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> 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.)		X
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		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?		X

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

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

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

N/A

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?

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

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

N/A

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

5b

6b

7b

X

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
STEVEN WEST 680 G STREET, SUITE B JACKSONVILLE, OR 97530	PRESIDENT 10.00	0.	0.	0.
CAROLYN WEST 680 G STREET, SUITE B JACKSONVILLE, OR 97530	VICE-PRESIDENT 10.00	0.	0.	0.
JASON ANDERSON PO BOX 1667 MEDFORD, OR 97501	SECRETARY/TREASURER 2.00	0.	0.	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 N/A	
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	8,155,356.
b	Average of monthly cash balances	1b	157,051.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	8,312,407.
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	8,312,407.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	124,686.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	8,187,721.
6	Minimum investment return. Enter 5% of line 5	6	409,386.

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	409,386.
2a	Tax on investment income for 2012 from Part VI, line 5	2a	3,489.
b	Income tax for 2012 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	3,489.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	405,897.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	405,897.
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	405,897.

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	409,015.
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	409,015.
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	409,015.

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.

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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				405,897.
2 Undistributed income, if any, as of the end of 2012				
a Enter amount for 2011 only			69,430.	
b Total for prior years		0.		
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	0.			
4 Qualifying distributions for 2012 from Part XII, line 4 ▶ \$ 409,015.				
a Applied to 2011, but not more than line 2a			69,430.	
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				339,585.
e Remaining amount distributed out of corpus	0.			
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	0.			
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 instructions			0.	
f Undistributed income for 2012. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2013				66,312.
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	0.			
9 Excess distributions carryover to 2013. Subtract lines 7 and 8 from line 6a	0.			
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)

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(i)(3) or ☐ 4942(i)(5)

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

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))

SEE STATEMENT 11

- 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 12

- 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 STATEMENT SEE ATTACHED STATEMENT JACKSONVILLE, OR 97530	NONE	SEE ATTACHED STATEMENT	SEE ATTACHED STATEMENT	339,420.
Total			3a	339,420.
b Approved for future payment				
NONE				
Total			3b	0.

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
DA DAVIDSON	251,838.	0.	251,838.
TOTAL TO FM 990-PF, PART I, LN 4	251,838.	0.	251,838.

FORM 990-PF	RENTAL INCOME	STATEMENT	2
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KIND AND LOCATION OF PROPERTY	ACTIVITY NUMBER	GROSS RENTAL INCOME
COMMERCIAL - JACKSONVILLE OR	1	11,427.
TOTAL TO FORM 990-PF, PART I, LINE 5A		11,427.

FORM 990-PF	LEGAL FEES	STATEMENT	3
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	2,711.	0.		2,711.
TO FM 990-PF, PG 1, LN 16A	2,711.	0.		2,711.

FORM 990-PF	ACCOUNTING FEES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	3,985.	1,993.		1,992.
PAYROLL SERVICE	391.	0.		391.
TO FORM 990-PF, PG 1, LN 16B	4,376.	1,993.		2,383.

FORM 990-PF	OTHER PROFESSIONAL FEES			STATEMENT 5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ADVISORY FEES	93,441.	93,441.		0.
TO FORM 990-PF, PG 1, LN 16C	93,441.	93,441.		0.

FORM 990-PF	TAXES			STATEMENT 6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
PAYROLL TAXES	2,996.	0.		2,996.
STATE TAX	946.	0.		946.
FEDERAL TAXES	-621.	0.		-621.
TO FORM 990-PF, PG 1, LN 18	3,321.	0.		3,321.

FORM 990-PF	OTHER EXPENSES			STATEMENT 7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
DUES AND SUBSCRIPTIONS	5,891.	0.		5,891.
INSURANCE	1,189.	0.		1,189.
MISCELLANEOUS	1,200.	0.		1,200.
OFFICE EXPENSE	290.	0.		290.
PUBLIC RELATIONS	3,620.	0.		3,620.
UTILITIES	1,850.	0.		1,850.
SUPPLIES	780.	0.		780.
TRAINING	900.	0.		900.
BUILDING REPAIRS & MAINTENANCE	1,742.	0.		1,742.
AUTO EXPENSE	223.	0.		223.
TRUSTEE REIMBURSEMENT	951.	0.		951.
TO FORM 990-PF, PG 1, LN 23	18,636.	0.		18,636.

FORM 990-PF	CORPORATE STOCK	STATEMENT	8
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SECURITIES	8,093,948.	8,403,530.
TOTAL TO FORM 990-PF, PART II, LINE 10B	8,093,948.	8,403,530.

FORM 990-PF	OTHER ASSETS	STATEMENT	9
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DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
DUE FROM CHANEY FOUNDATION	5,771.	0.	0.
INVESTMENT IN CWF PROPERTIES	204,757.	203,684.	203,684.
TO FORM 990-PF, PART II, LINE 15	210,528.	203,684.	203,684.

FORM 990-PF	OTHER LIABILITIES	STATEMENT	10
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DESCRIPTION	BOY AMOUNT	EOY AMOUNT
OREGON TAX PAYABLE	946.	946.
DUE TO CHANEY FOUNDATION	0.	17,942.
TOTAL TO FORM 990-PF, PART II, LINE 22	946.	18,888.

FORM 990-PF	PART XV - LINE 1A LIST OF FOUNDATION MANAGERS	STATEMENT	11
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NAME OF MANAGER

STEVEN WEST
CAROLYN WEST

FORM 990-PF

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

STATEMENT 12

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

CARRIE HANSON, EXECUTIVE DIRECTOR
680 G STREET SUITE B
JACKSONVILLE, OR 97530

TELEPHONE NUMBER

541-899-9976

EMAIL ADDRESS

CHANSON.FAMILYFOUNDATION@GMAIL.COM

FORM AND CONTENT OF APPLICATIONS

INTERNET APPLICATION FORM FOUND ON WEBSITE

ANY SUBMISSION DEADLINES

THE LAST BUSINESS DAY IN FEBRUARY AND AUGUST

RESTRICTIONS AND LIMITATIONS ON AWARDS

DISTRIBUTIONS WILL BE MADE WHICH PRIMARILY BENEFIT AREAS OF PUBLIC SCHOOL ENRICHMENT, HUMAN SERVICES, AND OTHER CHARITABLE CAUSES TO PROVIDE A BETTER OPPORTUNITY IN LIFE FOR CHILDREN AND THEIR FAMILIES WHO RESIDE IN THE GEOGRAPHIC AREAS OF SOUTHERN OREGON; JACKSON, JOSEPHINE, CURRY, AND KLAMATH COUNTIES.

THE FOLLOWING ACTIVITIES ARE INELIGIBLE FOR FUNDING: ENDOWMENTS OR ANNUAL FUND DRIVES, INDIRECT OR OVERHEAD EXPENSES, SPONSORSHIP OF FUNDRAISING EVENTS, AND VISUAL AND PERFORMING ARTS PROGRAMS (HOWEVER SOME SCHOOL-BASED PROJECTS MAY QUALIFY), PROJECTS THAT HAVE A SPECIFIC RELIGIOUS PURPOSE, PROPERTY ACQUISITION OR MULTI-MILLION DOLLAR CAPITAL CAMPAIGNS.

STATEMENT S226

Contributions, Gifts, and Grants Paid during the Year

(See Key Issue 22I)

Organization: West Family Foundation

TIN: 20-4720365

Tax Year Ended: 31-May-13

Form 990-PF, Part XV, Line 3a

	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
1	ACCESS, Inc. P.O. Box 4666 Medford, OR 97501	N/A	Open	To help procure, store and distribute emergency food	\$ 5,000.00
2	American Sewing Guild, S.O. Chapter 909 Pittview Ct. Central Point, OR 97502	N/A	Open	Purchase supplies for Community Service program	\$ 2,725.00
3	Applegate Valley Fire Protection District 1095 Upper Applegate Rd. Jacksonville, OR 97530	N/A	Open	Purchase a 12-lead cardiac monitor defibrillator	\$ 5,000.00
4	Ashland Emergency Food Bank P.O. Box 3578 Ashland, OR 97520	N/A	Open	Support the food purchase program	\$ 5,000.00
5	Assistance League of the Klamath Basin 1330 East Main Street Klamath Falls, OR 97601	N/A	Open	Support Operation School Bell	\$ 5,000.00
6	Camp Millennium 2876 Diamond Lake Blvd Roseburg, OR 97470	N/A	Open	Camper Sponsorships 2013	\$ 5,000.00
7	CASA of Jackson County, Inc. 613 Market Street Medford, OR 97504	N/A	Open	General Operating Support	\$ 3,750.00
8	CASA of Klamath County 403 Pine Street, 3rd Floor Klamath Falls, OR 97601	N/A	Open	CASA Peer Coordinator Implementation	\$ 2,500.00
9	Central Point Parks and Recreation Foundation 140 S. 3rd Street Central Point, OR 97502	N/A	Open	Purchase electronic educational equipment	\$ 1,440.00
10	City of Brookings 898 Elk Drive Brookings, OR 97415	N/A	Open	Remove and replace ball field backstops at Bud Cross Park	\$ 10,000.00
11	Curry County P.O. Box 4144 Brookings, OR 97415	N/A	Open	General operating support of the CASA program	\$ 4,000.00
12	Friends of the Fair Foundation 3551 E. Barnett Road, Ste 105 Medford, OR 97504	N/A	Open	Support the sustainability plan of the Jackson County Fairgrounds at the Expo	\$ 5,000.00
13	Grants Pass Family YMCA PO Box 5439 Grants Pass, OR 97427	N/A	Open	Youth Services Improvement Project	\$ 5,000.00
14	Grants Pass School District #7 725 NE Dean Drive Grants Pass, OR 97426	N/A	Open	Purchase netbooks & a mobile computer cart to be used in the Career Academy	\$ 3,100.00
15	HASL Independent Abilities Center 305 NE "E" Street Grants Pass, OR 97526	N/A	Open	Upgrade HASL's Computer Equipment	\$ 4,182.00
16	Hearts With A Mission 711 Medford Center #334 Medford, OR 97504	N/A	Open	General operating support	\$ 10,000.00

Form 990-PF, Part XV, Line 3a

	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
17	Jackson County Fire District 5 5811 South Pacific Highway Phoenix, OR 97535	N/A	Open	Purchase pagers for our firefighters to receive emergency dispatch information	\$ 4,500.00
18	Jackson County School District 549C 815 S.Oakdale Medford, OR 97501	N/A	Open	Medford Middle School Counseling Project (MMSCP)	\$ 5,000.00
19	Jackson County School District 549C 815 S.Oakdale Medford, OR 97501	N/A	Open	North Medford Football Locker-room renovation	\$ 3,100.00
20	Jackson County School District 549C 815 S.Oakdale Medford, OR 97501	N/A	Open	North Medford Football Locker-room renovation	\$ 6,000.00
21	Jackson County School District 549C 815 S.Oakdale Medford, OR 97501	N/A	Open	North Medford High School weight room project.	\$ 5,000.00
22	Jackson County School District 549C 815 S.Oakdale Medford, OR 97501	N/A	Open	Support the North Medford Baseball Arizona Tournament project	\$ 5,000.00
23	Jackson County School District 549C 815 S.Oakdale Medford, OR 97501	N/A	Open	Griffin Creek Elementary- Playground	\$ 10,000.00
24	Jackson County School District 549C 815 S.Oakdale Medford, OR 97501	N/A	Open	Steinway for Students Project at NMHS	\$ 10,000.00
25	Jackson County School District 549C 815 S.Oakdale Medford, OR 97501	N/A	Open	Scholarships for North Medford High School Students	\$ 4,700.00
26	Dove 815 S. Oakdale Street Medford, OR 97501	N/A	Open	Project Dove Field Trips	\$ 3,500.00
27	Kids Unlimited of Oregon 821 North Riverside Medford, OR 97501	N/A	Open	Support the United Way Day of Caring Project at White City Elementary	\$ 1,957.00
28	Lincoln School PTA 1132 NE 10th Street Grants Pass, OR 97426	N/A	Open	Lincoln Elementary School Track, Field & Pathways Improvement Project	\$ 6,000.00
29	Make A Wish Foundation of Oregon 2000 SW First Avenue Portland, OR 97201	N/A	Open	Grant a wish for a local child with a life- threatening medical condition.	\$ 5,000.00
30	Maslow Project 500 Monroe Street Medford, OR 97501	N/A	Open	Support the Outreach Program	\$ 10,000.00
31	Medford Jazz Festival 221 N Central, PMB 201 Medford, OR 97501	N/A	Open	Support the donated instrument program	\$ 3,500.00
32	Medford Youth Baseball Society P.O. Box 4224 Medford, OR 97501	N/A	Open	Complete the seating at Harry & David Field	\$ 10,000.00
33	Medical Teams International 9680 153rd Avenue NE Redmond, WA 98052	N/A	Open	Southern Oregon Mobile Dental Program	\$ 10,000.00
34	Mother Teresa Home dba Magdalene Home P.O. Box 255 Medford, OR 97501	N/A	Open	General operating support	\$ 5,000.00
35	Oregon Assoc of REALTORS Home Foundation PO Box 351 Salem, OR 97308	N/A	Open	3rd Annual Rogue Valley Food & Wine Classic	\$ 5,000.00

Form 990-PF, Part XV, Line 3a

	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
36	Oregon Childrens Foundation (SMART) 101 SW Market St. Portland, OR 97201	N/A	Open	Purchase books for the South Central SMART	\$ 5,000.00
37	Oregon Childrens Foundation (SMART) 101 SW Market St. Portland, OR 97201	N/A	Open	Support the SMART programs at Kalmiopsis and Driftwood Elementary schools	\$ 3,500.00
38	Oregon Coast Community Action (ORCCA) P.O. Box 899 Coos Bay, OR 97420	N/A	Open	Share Bear Snack Pack Program	\$ 5,000.00
39	Oregon Parent Center PO Box 216 Wolf Creek, OR 97497	N/A	Open	Renovate and improve the organic gardening project to help provide quality produce for school meals	\$ 5,000.00
40	Over The Rainbow, Inc. 92611 Airport Rd. Sixes, OR 97476	N/A	Open	General operating support	\$ 2,000.00
41	Peace House P.O. Box 524 Ashland, OR 97520	N/A	Open	Purchase food for the Uncle Foods Diner program	\$ 1,000.00
42	Peter Britt Gardens Music and Arts Festival P.O. Box 1124 Medford, OR 97501	N/A	Open	Construction of the Britt Festivals' Performance Garden	\$ 1,500.00
43	Peter Britt Gardens Music and Arts Festival P.O. Box 1124 Phoenix, OR 97535	N/A	Open	Music in the Mornings	\$ 5,000.00
44	Phoenix Counseling Center P.O. Box 1257 Phoenix, OR 97535	N/A	Open	"FQ on Campus" (Future Quest) at Phoenix High School	\$ 4,530.00
45	Phoenix School Dist. #4 745 N. Rose St. Phoenix, OR 97535	N/A	Open	Purchase 15 iPads for the high school social studies classroom.	\$ 5,785.00
46	Phoenix School Dist. #4 745 N. Rose St. Phoenix, OR 97535	N/A	Open	Purchase microphones, intercom system and sound equipment for the Phoenix H.S. Theatre Program	\$ 4,000.00
47	Pregnancy Center of the Illinois Valley PO Box 993 Cave Junction, OR 97523	N/A	Open	Pregnancy Education & Incentives	\$ 2,500.00
48	Reaching Our Community (ROC) P.O. Box 2004 Grants Pass, OR 97528	N/A	Open	Purchase of food for distribution in the ROC food pantry	\$ 9,690.00
49	Rogue Outreach Center 211 Pine Street Rogue River, OR 97537	N/A	Open	Youth Enrichment program	\$ 2,500.00
50	Rogue River School District 35 1898 East Evans Creek Road Rogue River, OR 97537	N/A	Open	Purchase picnic tables and TV for student announcements	\$ 4,400.00
51	Rogue Valley Pregnancy Resource Center 2019 Aero Way Suite #103 Medford, OR 97504	N/A	Open	Computers, flat screen televisions and patient tracking program	\$ 2,546.00
52	Rogue Valley Symphony Association 1250 Siskiyou Blvd Ashland, OR 97520	N/A	Open	Support the RVSA Chamber Players in the Classroom music education program serving 6000 Kindergarten	\$ 3,000.00
53	Sanctuary One 13195 Upper Applegate Road Jacksonville, OR 97530	N/A	Open	2 heavy-duty, ADA-approved, wheelchair accessible picnic tables with a 50-year warranty	\$ 1,200.00
54	Society of St Vincent dePaul 132 SE H Street Grants Pass, OR 97526	N/A	Open	Support the purchase of food	\$ 5,000.00

Form 990-PF, Part XV, Line 3a

	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
55	Society of St. Vincent DePaul PO Box 1663 Medford, OR 97501	N/A	Open	Back-to-School Supply Distribution program	\$ 5,000.00
56	Southern Oregon Child & Family Council, Inc. PO Box 3697 Central Point, OR 97502	N/A	Open	Purchase of a Plusoptix S09 Vision Screener	\$ 7,360.00
57	St. Timothy's Episcopal Church PO Box 1237 Brookings, OR 97415	N/A	Open	Support direct clinical services including health care and dental care at the Outreach Clinic	\$ 10,000.00
58	The Gleaning Network, Inc. P.O. Box 5214 Central Point, OR 97502	N/A	Open	Sustainable Resource Development	\$ 2,500.00
59	The Salvation Army, A California Corp 304 Beatty St. Medford, OR 97501	N/A	Open	Emergency Energy and Housing Assistance Program	\$ 10,000.00
60	Transformation Wellness Center 3647 Hwy 39 Klamath Falls, OR 97603	N/A	Open	Medication Project	\$ 4,000.00
61	Umpqua Community Action Network (UCAN)- 1470 SE M Street, #1-C Grants Pass, OR 97526	N/A	Open	Raptor Creek Farm Garden Expansion Project	\$ 5,000.00
62	Unitarian Universalist Church of Grants Pass P.O. Box 1602 Grants Pass, 97528	N/A	Open	Homeless Teen Backpack Project	\$ 2,955.00
63	United Way of Jackson County 769 Spring St. Medford, OR 97504	N/A	Open	Support the work of the 2013 Oregon Nonprofit Leaders Conference	\$ 1,500.00
64	Upper Rogue Community Center, Inc. PO Box 216 Shady Cove, OR 97539	N/A	Open	To purchase food that will be distributed to families and individuals through the Food Pantry	\$ 3,000.00
65	White Oak Farm and Education Center 1940 Kincaid Road Williams, OR 97544	N/A	Open	To purchase & build long lasting tent cabins to support our overnight educational & experiential	\$ 5,000.00
66	Wildlife Images Rehabilitation & Education Center P.O. 36 Merlin, OR 97532	N/A	Open	Professionally prepared planemetric base map/survey which will facilitate project planning/implementation.	\$ 5,000.00
67	Williams Fire Protection District 211 East Fork Road Williams, OR 97544	N/A	Open	Purchase a set of Hydraulic Rescue Tools, also known as the "Jaws of Life"	\$ 10,000.00
68	YMCA- Rogue Valley Family 522 West Sixth Street Medford, OR 97501	N/A	Open	YMCA Financial Assistance for Y Camp Program	\$ 5,000.00
TOTAL PAID DURING THIS YEAR					\$ 339,420.00



Schedule of Realized Gains and Losses

06/01/2012 - 05/31/2013

Tuesday, June 18, 2013
8173 CURT BENNETT/DAVE PRESZLER

D.A. Davidson & Co.
member SIPC

Prepared For:

****-5814

WEST FAMILY FOUNDATION
ATTN: STEVE AND CAROLYN WEST
MGD ASSETS CUTLER LG CAP CORE
680 G STREET SUITE B
JACKSONVILLE OR 97530-3207

Quantity	Name	Security	Open Date	Cost Amount	Adjusted Cost Amount	Trade Price	Close Date	Close Amt	Close Price	Realized	% Gain or Loss
Short											
65	AMERN EXPRESS CO	AXP	5/8/2012 ²	3,873.34 ¹		59.5889	4/16/2013	4,218.41	64.9001	345.07	8.91
25	BECTON DICKINSON COMPANY	BDX	5/8/2012 ²	1,913.75 ¹		78.5498	4/16/2013	2,374.44	94.9800	460.69	24.07
65	DU PONT E.I. DE NEMOUR&CO	DD	5/8/2012 ²	3,384.54 ¹		52.0689	4/16/2013	3,218.38	49.5301	-165.16	-4.88
288	HOME DEPOT INC	HD	5/8/2012 ²	13,337.21 ¹		50.1399	3/13/2013	18,785.16	70.8801	5,457.95	40.92
45	HOME DEPOT INC	HD	5/8/2012 ²	2,256.30 ¹		50.1398	4/16/2013	3,281.07	72.4700	1,004.77	44.53
40	HONEYWELL INTL INC	HON	5/8/2012 ²	2,348.36 ¹		58.7089	4/16/2013	2,921.13	73.0300	572.77	24.39
20	INTL BUSINESS MACHS CORP	IBM	5/8/2012 ²	4,001.39 ¹		200.0898	4/16/2013	4,234.50	211.7300	233.11	5.83
30	MCDONALDS CORP	MCD	5/8/2012 ²	2,822.10 ¹		94.0898	4/16/2013	3,084.89	102.8300	262.73	9.31
65	MERCK & COMPANY INC NEW	MRK	5/8/2012 ²	2,495.99 ¹		38.3988	4/16/2013	3,055.59	47.0101	559.60	22.42
85	MICROSOFT CORP	MSFT	6/20/2012 ²	2,617.07 ¹		30.7890	4/16/2013	2,489.28	29.0510	-147.79	-5.65
15	MONSANTO COMPANY NEW	MON	5/8/2012 ²	1,100.70 ¹		73.3799	4/16/2013	1,575.26	105.0200	474.56	43.11
50	NATL FUEL GAS COMPANY	NFG	5/8/2012 ²	2,992.75 ¹		45.8550	4/16/2013	2,828.13	58.5240	633.38	27.83
80	NEWMONT MNG CORP HLDG CO	NEM	3/13/2013 ²	2,348.27 ¹		38.1045	4/16/2013	2,051.98	34.2001	-294.31	-12.54
1,050	NUCOR CORP	NUE	5/8/2012 ²	38,785.90 ¹		38.9199	3/13/2013	48,785.95	48.4448	10,000.05	25.80
35	PROCTER & GAMBLE COMPANY	PG	5/8/2012 ²	2,247.70 ¹		64.2200	4/16/2013	2,803.61	80.1050	555.91	24.73
145	SCHWAB CHARLES CORP NEW	SCHW	5/8/2012 ²	1,905.28 ¹		13.1399	4/16/2013	2,438.85	18.8201	533.56	28.00
80	TEXAS INSTRUMENTS INC	TXN	5/8/2012 ²	2,708.29 ¹		30.0688	4/16/2013	3,222.83	35.5101	518.54	19.09
100	UNION PACIFIC CORP	UNP	4/3/2012 ²	10,734.00 ¹		107.3400	6/20/2012	11,888.11	118.8837	954.11	8.89
100	UNION PACIFIC CORP	UNP	4/3/2012 ²	10,734.00 ¹		107.3400	6/20/2012	11,888.11	118.8837	954.11	8.89
100	UNION PACIFIC CORP	UNP	4/3/2012 ²	10,734.00 ¹		107.3400	6/20/2012	11,888.11	118.8837	954.11	8.89
100	UNION PACIFIC CORP	UNP	4/3/2012 ²	10,733.99 ¹		107.3399	6/20/2012	11,888.11	118.8837	954.12	8.89
200	UNION PACIFIC CORP	UNP	4/3/2012 ²	21,468.00 ¹		107.3400	6/20/2012	23,376.22	118.8837	1,908.22	8.89
35	UNITED TECHNOLOGIES CORP	UTX	5/8/2012 ²	2,739.45 ¹		78.2699	4/16/2013	3,295.52	94.1600	556.07	20.30
				157,558.39				184,842.88		27,284.47	
Long											
65	AT&T INC	T	8/5/2007 ²	2,622.75 ¹		40.3500	4/16/2013	2,471.25	38.0201	-151.50	-5.78
70	ARCHER DANIELS MIDLAND C	ADM	6/5/2007 ²	2,405.90 ¹		34.3700	4/16/2013	2,256.05	32.2301	-149.85	-6.23
75	BRISTOL MYERS SQUIBB CO	BMJ	4/3/2012 ²	2,539.49 ¹		33.8598	4/16/2013	3,088.89	40.8901	527.20	20.78
30	CHEVRON CORP	CVX	4/3/2012 ²	3,208.80 ¹		106.9900	4/16/2013	3,508.92	116.9000	298.12	9.29
40	CHUBB CORP	CB	4/3/2012 ²	2,785.60 ¹		68.8900	4/16/2013	3,546.32	88.6900	750.72	28.85



Schedule of Realized Gains and Losses

06/01/2012 - 05/31/2013

Tuesday, June 18, 2013
8173 CURT BENNETT/DAVE PRESZLER

D.A. Davidson & Co.
member SIPC

Prepared For:

****-5814

WEST FAMILY FOUNDATION
ATTN: STEVE AND CAROLYN WEST
MGD ASSETS CUTLER LG CAP CORE

Quantity	Name	Security	Open Date	Cost Amount	Adjusted Cost Amount	Trade Price	Close Date	Close Amt	Close Price	Realized	% Gain or Loss
Long - Continued											
40	CONOCOPhillips	COP	8/5/2007 ^o	2,414.53 ^o		79.3866	4/18/2013	2,281.54	57.2800	-122.99	-5.09
60	DISNEY WALT COMPANY	DIS	4/3/2012 ^o	2,587.19 ^o		43.1189	4/18/2013	3,622.72	60.3501	1,035.53	40.03
45	EMERSON ELECTRIC COMPANY	EMR	8/6/2007 ^o	2,178.74 ^o		48.4183	4/18/2013	2,440.29	54.2300	261.55	12.00
30	EXXON MOBIL CORP	XOM	8/5/2007 ^o	2,527.84 ^o		84.2547	4/18/2013	2,602.14	88.7400	74.50	2.85
105	INTEL CORP	INTC	4/3/2012 ^o	2,946.19 ^o		28.0590	4/18/2013	2,277.49	21.8509	-668.70	-22.70
35	JOHNSON & JOHNSON	JNJ	8/5/2007 ^o	2,216.90 ^o		63.3400	4/18/2013	2,917.18	83.3500	700.28	31.59
30	KIMBERLY CLARK CORP	KMB	8/5/2007 ^o	2,161.50 ^o		72.0500	4/18/2013	3,056.93	101.9000	895.43	41.43
25	M&T BANK CORP	MTB	8/2/2011 ^o	2,157.23 ^o		86.2892	4/18/2013	2,446.19	97.8101	287.96	13.35
60	NORDSTROM INC	JWN	4/3/2012 ^o	3,332.39 ^o		55.5389	4/18/2013	3,346.13	55.8201	16.74	0.50
35	PEPSICO INC	PEP	6/5/2007 ^o	2,369.73 ^o		67.7084	4/18/2013	2,798.23	79.8800	428.50	18.12
400	PHILLIPS 66	PSX	6/5/2007 ^o	15,228.82 ^o		38.0670	1/31/2013	24,277.41	60.8848	9,050.59	59.44
60	SYSCO CORP	SY	6/5/2007 ^o	1,987.84 ^o		32.7873	4/18/2013	2,055.58	34.2801	67.72	4.48
60	VERIZON COMMS INC	VZ	8/8/2007 ^o	2,402.23 ^o		40.0371	4/18/2013	3,050.94	50.8501	648.71	27.00
								72,032.98		13,971.51	
				89,061.47							



Schedule of Realized Gains and Losses

06/01/2012 - 05/31/2013

Tuesday, June 18, 2013
8173 CURT BENNETT/DAVE PRESZLER

D.A. Davidson & Co.
member SIPC

Prepared For:

****-5814
WEST FAMILY FOUNDATION
ATTN: STEVE AND CAROLYN WEST
MGD ASSETS CUTLER LG CAP CORE

Quantity	Name	Security	Open Date	Cost Amount	Adjusted Cost Amount	Trade Price	Close Date	Close Amt	Close Price	Realized	% Gain or Loss
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Report Summary				218,619.86	0.00			256,875.64		41,255.68	
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Realized Gains or Losses

Short Term	27,284.17
Long Term	13,971.51

Legend

(*) Security Held Away

Open Date

C - Covered Tax Lot

N - Noncovered Tax Lot

M - Net Row Contains Both Covered and Noncovered Tax Lots

W - Open Date Reflects Wash Sale Date

Cost Amount

E - Pre Effective

O - Post Effective

N - Not Average Cost

M - Net Row Contains Tax Lots with Multiple Elections

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D.A. Davidson & Co.

member SIPC

Prepared For:

***-1339

WEST FAMILY FOUNDATION
MGD ASSETS RUSSELL CORE BAL
680 G ST SUITE B
JACKSONVILLE OR 97530-3207

Schedule of Realized Gains and Losses

06/01/2012 - 05/31/2013

Tuesday, June 18, 2013
8173 CURT BENNETT/DAVE PRESZLER

Quantity	Name	Security	Open Date	Cost Amount	Adjusted Cost Amount	Trade Price	Close Date	Close Amt	Close Price	Realized	% Gain or Loss
Short											
2,985,398	RUSSELL US CORE EQ I	REASX	8/24/2011	75,380.41		25.4189	8/18/2012	88,832.28	29.9899	13,551.88	17.98
28,370	RUSSELL US CORE EQ I	REASX	10/4/2011	881.82		24.0201	8/18/2012	851.03	29.9899	189.41	24.85
44,538	RUSSELL US CORE EQ I	REASX	12/23/2011	1,201.57		28.9797	8/18/2012	1,335.83	29.9899	134.08	11.18
13,773	RUSSELL US CORE EQ I	REASX	4/3/2012	421.04		30.5699	8/18/2012	413.05	29.9899	-7.99	-1.80
22,280	RUSSELL US CORE EQ I	REASX	7/3/2012	647.08		29.0300	8/18/2012	688.48	29.9899	21.40	3.31
2,049,549	RUSSELL US DEFNSV EQ I	REDSX	8/24/2011	58,854.49		27.7400	8/18/2012	67,814.62	32.9899	10,760.13	18.93
23,291	RUSSELL US DEFNSV EQ I	REDSX	10/4/2011	612.32		28.2899	8/18/2012	788.37	32.9899	158.05	25.49
33,651	RUSSELL US DEFNSV EQ I	REDSX	12/23/2011	1,002.45		29.7898	8/18/2012	1,110.15	32.9899	107.70	10.74
14,838	RUSSELL US DEFNSV EQ I	REDSX	4/3/2012	491.83		33.5985	8/18/2012	482.91	32.9899	-8.92	-1.81
21,333	RUSSELL US DEFNSV EQ I	REDSX	7/3/2012	688.85		32.2903	8/18/2012	703.78	32.9899	14.93	2.17
				137,981.66				182,890.31		24,998.69	
Long											
293,247	RUBBELL GLB RL EBT SEC S	RRSX	8/13/2010	9,636.10		32.8500	11/14/2012	11,093.55	37.8300	1,457.45	15.12
6,477,104	RUSSELL US CORE EQ I	REASX	8/13/2010	152,017.62		23.4699	8/18/2012	184,248.35	29.9899	42,230.73	27.78
20,184	RUSSELL US CORE EQ I	REASX	10/4/2010	502.08		24.8988	8/18/2012	604.72	29.9899	102.64	20.44
25,845	RUSSELL US CORE EQ I	REASX	12/20/2010	708.80		27.8701	8/18/2012	788.08	29.9899	59.49	8.38
6,307	RUSSELL US CORE EQ I	REASX	4/4/2011	186.81		29.8194	8/18/2012	185.15	29.9899	2.34	1.25
18,334	RUSSELL US CORE EQ I	REASX	7/5/2011	569.77		29.4898	8/18/2012	579.83	29.9899	10.06	1.77
5,299,482	RUSSELL US DEFNSV EQ I	REDSX	8/13/2010	130,472.75		24.6199	8/18/2012	174,828.25	32.9899	44,355.50	34.00
34,845	RUSSELL US DEFNSV EQ I	REDSX	10/4/2010	900.40		25.8401	8/18/2012	1,149.54	32.9899	248.14	27.67
30,880	RUSSELL US DEFNSV EQ I	REDSX	12/20/2010	888.98		28.3899	8/18/2012	1,008.76	32.9899	140.80	16.20
10,246	RUSSELL US DEFNSV EQ I	REDSX	4/4/2011	318.84		31.0989	8/18/2012	338.02	32.9899	19.38	6.08
15,726	RUSSELL US DEFNSV EQ I	REDSX	7/5/2011	499.47		31.7607	8/18/2012	518.60	32.9899	19.33	3.87
600,754	RUSSELL INTL DEV MKT I	RINSX	8/13/2010	16,684.92		27.7400	8/18/2012	17,301.72	28.8000	616.80	3.82
570,849	RUSSELL INTL DEV MKT I	RINSX	8/13/2010	15,829.80		27.7400	11/14/2012	16,491.77	28.8000	661.97	4.18
1,888,276	RUSSELL STRAT BD I	RFCSX	8/13/2010	18,383.54		10.5899	11/14/2012	19,208.89	11.3900	843.15	4.59
3,222,095	RUSSELL STRAT BD I	RFCSX	8/13/2010	35,249.72		10.9399	11/14/2012	38,696.88	11.3900	1,449.94	4.11
3,752,869	RUSSELL GLB EQ S	RGESX	8/13/2010	28,221.57		7.5199	8/18/2012	32,424.79	8.8400	4,203.22	14.89
675,472	RUSSELL GLB INFRA S	RGISX	10/6/2010	6,889.81		10.2000	11/14/2012	7,207.29	10.8700	317.48	4.61
				417,901.56				514,681.98		88,780.42	



Schedule of Realized Gains and Losses

06/01/2012 - 05/31/2013

Tuesday, June 18, 2013
8173 CURT BENNETT/DAVE PRESZLER

D.A. Davidson & Co.
member SIPC

Prepared For:

****-1338

WEST FAMILY FOUNDATION
MGD ASSETS RUSSELL CORE BAL

Quantity	Name	Security	Open Date	Cost Amount	Adjusted Cost Amount	Trade Price	Close Date	Close Amt	Close Price	Realized	% Gain or Loss
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Report Summary	555,883.22	0.00	677,543.29	121,659.07
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Realized Gains or Losses	
Short Term	24,898.65
Long Term	96,760.42

Legend	
(*) Security Held Away	Cost Amount
Open Date	E - Pre Effective
C - Covered Tax Lot	O - Post Effective
N - Noncovered Tax Lot	N - Net Average Cost
M - Net Row Contains Both Covered and Noncovered Tax Lots	M - Net Row Contains Tax Lots with Multiple Elections
W - Open Date Reflects Wash Sale Date	

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D.A. Davidson & Co.
member SIPC

Prepared For:
****-1344

WEST FAMILY FOUNDATION
CHOICE ACCOUNT
680 G ST SUITE B
JACKSONVILLE OR 97530-3207

Schedule of Realized Gains and Losses

06/01/2012 - 05/31/2013

Tuesday, June 18, 2013
8173 CURT BENNETT/DAVE PRESZLER

Quantity	Name	Security	Open Date	Cost Amount	Adjusted Cost Amount	Trade Price	Close Date	Close Amt	Close Price	Realized	% Gain or Loss
Long											
400,8020	TRANSAMR MMGR ALT STR A	IMUAX	5/24/2011 ⁰	4,004.01 ⁰		9.9800	10/16/2012	4,000.00	9.9789	-4.01	-0.10
5,088,8560	TRANSAMR MMGR ALT STR A	IMUAX	5/24/2011 ⁰	50,807.80 ⁰		9.9800	11/12/2012	50,000.00	9.8700	-807.80	-1.20
2,487,5020	TRANSAMR MMGR ALT STR A	IMUAX	5/24/2011 ⁰	24,950.08 ⁰		9.9800	12/13/2012	25,000.00	10.0100	49.95	0.20
328,4420	UBS GLB ALLOC A	BGLX	3/17/2008 ⁰	4,576.75 ⁰		14.0201	7/31/2012	3,000.00	9.1889	-1,576.75	-34.45
9,940,3560	UBS GLB ALLOC A	BGLX	3/17/2008 ⁰	139,384.87 ⁰		14.0201	4/11/2013	100,000.00	10.0599	-39,384.87	-28.25
28,000	UBS GLB ALLOC A	BGLX	3/17/2008 ⁰	392,582.95 ⁰		14.0201	4/22/2013	277,780.00	9.9200	-114,802.95	-29.24
				616,066.53				459,780.00		-156,306.53	
Report Summary				616,066.53	0.00			459,780.00		-156,306.53	

Realized Gains or Losses

Long Term -156,306.53

Legend

(*) Security Held Away

Open Date

C - Covered Tax Lot
N - Noncovered Tax Lot
M - Net Row Contains Both Covered and Noncovered Tax Lots
W - Open Date Reflects Wash Sale Date

Cost Amount

E - Pre Effective
O - Post Effective
N - Not Average Cost
M - Net Row Contains Tax Lots with Multiple Elections

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