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Form, 990-PF

C Adjusted net income (if negative, enter -0-)

BAA For Paperwork Reduction Act Notice, see instructions.

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

OMB No 1545-0052

2012

Treated as a Private Foundation Department of the Treasury Internal Revenue Service Note. The foundation may be able to use a copy of this return to satisfy state reporting requirements For calendar year 2012, or tax year beginning . 2012, and ending 7/01 6/30 2013 Employer identification number The Morrissey Family Foundation, Inc. 20-2507881 P.O. Box 6419 Telephone number (see the instructions) (805) 544-1441 Los Osos, CA 93402 If exemption application is pending, check here G Check all that apply. Initial return Initial return of a former public charity D 1 Foreign organizations, check here Final return Amended return Address change Name change 2 Foreign organizations meeting the 85% test, check here and attach computation X Section 501(c)(3) exempt private foundation Check type of organization Section 4947(a)(1) nonexempt charitable trust Other taxable private foundation If private foundation status was terminated under section 507(b)(1)(A), check here Fair market value of all assets at end of year J Accounting method X Cash Accrual (from Part II, column (c), line 16) Other (specify) If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶\$ (Part T. column (d) must be on cash basis 738,904 Part Analysis of Revenue and (a) Revenue and (b) Net investment (d) Disbursements (c) Adjusted net Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) for charitable expenses per books ıncome income purposes (cash basis only) (see instructions)) Contributions, gifts, grants, etc, received (att sch) 2 March 2 1 95,000 7 - MAN (A. 10) **建**定态。1923 If the foundn is not req to att Sch B Interest on savings and temporary cash investments 20,111 20,111 20,111 Dividends and interest from securities 5 a Gross rents **b** Net rental income or (loss) 6 a Net gain/(loss) from sale of assets not on line 10 REVENUE b Gross sales price for all assets on line 6a Capital gain net income (from Part IV, line 2) Net short-term capital gain Mark & Income modifications 10 a Gross sales less allowances

b Less Cost of goods sold c Gross profit/(loss) (att sch) F-80%53.2 O 11 Other income (attach schedule) 12 Total. Add lines 1 through 11 115.1117 20.111 $1-1.1_{\odot}$ 13 n Compensation of officers, directors, trustees, etc 100 14 Other employee salaries and wages èΰ 15 Pension plans, employee benefits 16a Legal fees (attach schedule) ا ا احدا احدا **b** Accounting fees (attach sch) See St 1 600c Other prof fees (attach sch) 17 Interest 251 See Stm 2 Taxes (attach schedule)(see instrs) Depreciation (attach 19 sch) and depletion 20 Occupancy Travel, conferences, and meetings 21 1,509 22 Printing and publications Other expenses (attach schedule) 23 See Statement 3 9,110 Total operating and administrative expenses. Add lines 13 through 23 11,470 Contributions, gifts, grants paid Part XV 38,824 38,824 Total expenses and disbursements. Add lines 24 and 25 26 0 0 38,824 50,294 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements 64,817 v, ** 20,111 b Net investment income (if negative, enter -0)

20,111

Form	990-	PF (2012) The Morrissey Family Foundation,	Inc.		20-2507881		
	Attached schedules and amounts in the description Beginning				End o	of year	
- C		(See instructions)	(a) Book Value	(b) Book Valu	ıe	(c) Fair Ma	arket Value
	1	Cash — non-interest-bearing					
	2	Savings and temporary cash investments	742,542.	738,9	904.		38,904.
	3	Accounts receivable			šČ.12		
		Less allowance for doubtful accounts ▶					
	4	Pledges receivable	· · ·			,	Ģ.,
		Less. allowance for doubtful accounts ▶			~~~~		
	5	Grants receivable					
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)					
	7	Other notes and loans receivable (attach sch)	* /.	8 1 1 2 2		بزم	18 C
Ą		Less allowance for doubtful accounts				1	
Š	8	Inventories for sale or use					
A S E T	9	Prepaid expenses and deferred charges				<u> </u>	
Š	10 a	Investments – US and state government obligations (attach schedule)	, ,_,,,				
	l t	Investments — corporate stock (attach schedule)				 	
		: Investments — corporate bonds (attach schedule)					
	11	Investments – land, buildings, and equipment, basis			i.		. Žavijust
		Less. accumulated depreciation (attach schedule)				4444	
	12	Investments – mortgage loans.					
	13	Investments - other (attach schedule)					
	14	Land, buildings, and equipment basis ► 691.	A SECTION OF THE SECT	Charles	', ',	100 M 100 F	
		Less accumulated depreciation (attach schedule) See Stmt 4 > 691.		Land Carlotter	Suddin	1 3 - 1 3 4 4 4 4 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5	
	15	Other assets (describe ►)					
	16	Total assets (to be completed by all filers -				_	
		see the instructions Also, see page 1, item I)	742,542.	738,9)04.	7	38,904.
ī	17	Accounts payable and accrued expenses					
A	18	Grants payable					
B	19	Deferred revenue					
Ĺ	20	Loans from officers, directors, trustees, & other disqualified persons				73:5	
ļ	21	Mortgages and other notes payable (attach schedule)				350	
i	22	Other liabilities (describe					
E S	23	Total liabilities (add lines 17 through 22)	0.		0.		
		Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.				77,	
		•				4	
N F E U	24	Unrestricted					
TN	25	Temporarily restricted					
, D	26	Permanently restricted				i	***1
A B S A E L A		Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.					1
EL	27	Capital stock, trust principal, or current funds				, 135°	
ร์ พิ	28	Paid-in or capital surplus, or land, building, and equipment fund				٠,	`]
Č	29	Retained earnings, accumulated income, endowment, or other funds	742,542.	738,9	104		, [
O E R S	30	Total net assets or fund balances (see instructions)	742,542.	738,9			_
	31	Total liabilities and net assets/fund balances (see instructions)	742,542.	738,9			
Par		Analysis of Changes in Net Assets or Fund Balance	es	,,,,,			
1		net assets or fund balances at beginning of year - Part II, colu					
•	end-	of-year figure reported on prior year's return)	mm (a), mne 30 (must a	gice will!	1	7	42,542.
2		r amount from Part I, line 27a			2		64,817.
3		increases not included in line 2 (itemize)			3		5 3, 511.
4		lines 1, 2, and 3.	·		4	0	07,359.
5		ises not included in line 2 (itemize) See Statement	5		5		68,455.
_		net assets or fund balances at end of year (line 4 minus line 5)	- Part II column (b)	ine 30	6		38,904.
		The state of the s				<u> </u>	50,504.

Form 9 9	0-PF (2012) The Morri	issey Family Foundation,	Inc.		20-2507881	, Page 3
Part IV	(a) List and describ	Losses for Tax on Investment e the kind(s) of property sold (e g , recise, or common stock, 200 shares MLC	al estate.	(b) How acquired P — Purchase D — Donation	(C) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1a N	/A					
b	·					
С						
d	-					
e						
	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other bas plus expense of sale		(h) Gain or (e) plus (f) m	
а						
b						
С						
<u>d</u>						
е						
		wing gain in column (h) and owned by	the foundation on 12/31/69		(I) Gains (Coli	umn (h)
	(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column over column (j), if an		pain minus column (F an -0-) or Losses (fr	
а						
b						
С						
d						
<u>e</u>						
Part V (For opt of section Was the	Part I, line 8 Qualification Under ional use by domestic privation 4940(d)(2) applies, leave foundation liable for the se	er Section 4940(e) for Reduced te foundations subject to the section 4 this part blank ction 4942 tax on the distributable amalify under section 4940(e) Do not con	Tax on Net Investment 940(a) tax on net investment punt of any year in the base	nt income)	Yes	X No
1 Er	iter the appropriate amount	in each column for each year, see the	instructions before making	any entries		
Cal	(a) Base period years endar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use asse	ets (col	(d) Distribution umn (b) divided	ratio by column (c))
	2011	49,033.	710	,809.		0.068982
	2010	56,854.		,030.	••	0.081566
	2009	46,430.		788.		0.065322
	2008	37,833.		,308.		0.062502
	2007	17,460.		,387.		0.040758
2 To	tal of line 1, column (d)			2		0.319130
3 Av	erage distribution ratio for the mber of years the foundation	he 5-year base period — divide the totan has been in existence if less than 5	al on line 2 by 5, or by the years	3		0.063826
4 En	ter the net value of nonchar	ritable-use assets for 2012 from Part X	K, line 5	4		746,382.
5 Mu	ltiply line 4 by line 3			5		47,639.
6 En	ter 1% of net investment in	come (1% of Part I, line 27b)		6		201.
7 Ad	d lines 5 and 6			7		47,840.

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

8 Enter qualifying distributions from Part XII, line 4

38,824.

		<u>0-250788</u>		<u> </u>	age 4
	🚯 VI 💥 Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 — 🤋	see instructi	ons)		
1 a	Exempt operating foundations described in section 4940(d)(2), check here				
	Date of ruling or determination letter: (attach copy of letter if necessary – see instrs)				
ı	Domestic foundations that meet the section 4940(e) requirements in Part V,	1		4	402.
	check here ► and enter 1% of Part I, line 27b				7,70
•	: All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, column (b)	200			
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			4 02.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)				0.
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5			4 02.
6	Credits/Payments.	N. 4. 128	6407866	777	102.
	2012 estimated tax pmts and 2011 overpayment credited to 2012				
	Exempt foreign organizations — tax withheld at source 6b	-			
	: Tax paid with application for extension of time to file (Form 8868)				
	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			
9	Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed	▶ 9			402.
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	→ 10			102.
11	Enter the amount of line 10 to be Credited to 2013 estimated tax	► 11 T			
Pai	t VII-A Statements Regarding Activities				
	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did if		2.00	Yes	No
, ,	participate or intervene in any political campaign?	•	1 a		Х
ŀ	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)?		1 b		
	·		200	38.00	X
	If the answer is 'Yes' to 1a or 1b , attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities				
	Did the foundation file Form 1120-POL for this year?		1 c		X
(Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation (2) On foundation (3)	,			(* , *) (
•	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on		<u>0 - </u>		5.2
	foundation managers ►\$ 0.				45
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?		2		Х
	If 'Yes,' attach a detailed description of the activities			(10.2)	11.5%
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles			33	
•	of incorporation, or bylaws, or other similar instruments? If 'Yes,' attach a conformed copy of the changes		3		Х
4 8	Did the foundation have unrelated business gross income of \$1,000 or more during the year?		4 a		Х
t	If 'Yes,' has it filed a tax return on Form 990-T for this year?		4 b	N	/A
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?		5		Х
	If 'Yes,' attach the statement required by General Instruction T				22.0
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? 	ŧ	6	24.0	Х
7	Did the foundation have at least \$5,000 in assets at any time during the year? If 'Yes,' complete Part II, column (c), and Part XV		7	Х	
	Enter the states to which the foundation reports or with which it is registered (see instructions)	•	W 13	<i>(4)</i>	K. (1)
	CA				
F	If the answer is 'Yes' to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General		1		
•	(or designate) of each state as required by General Instruction G? If 'No,' attach explanation		8 b	Х	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 49420003) or 4942(ນັ	5)	1637	1115
-	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) for calendar year 2012 or the taxable year beginning in 2012 (see instructions for Part XIV)? If 'Yes,' comp	olete Part XI	ν´ 9	Х	
10	Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names	3			
	and addresses		10	<u> </u>	X
BAA			Form 990	D-PF (2	2012)

Form	990-PF (2012) The Morrissey Family Foundation, Inc.	20-	250788	1	P	age 5
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		Х
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified persadvisory privileges? If 'Yes,' attach statement (see instructions)	on had		12		Х
13	Did the foundation comply with the public inspection requirements for its annual returns and exemptio	n applica	tion?	13	Х	
14	The books are in care of Marla Morrisey Telephone	e no ►	(805)	544	-144	1
15	Located at P.O. Box 6419 Los Osos CA ZIP + 4 P 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	<u>934</u> ►	12 15	N/A	,	∏ N/A
16	At any time during calendar year 2012, did the foundation have an interest in or a signature or other authority bank, securities, or other financial account in a foreign country?	over a		16	Yes	No X
	See the instructions for exceptions and filing requirements for Form TD F 90-22 1. If 'Yes,' enter the name of t foreign country ►	he				
Par	t 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
1 2	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	X No			- A. W.
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	Yes	XNo			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	Yes	X No			4.
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	Yes	XNo			
	(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	XNo			
	(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	XNo			
t	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	₁ 7 ►	П	1 b	N	/A
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?		Ш	1 c		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))					
Z	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 20 , 20 , 20 , 20	Yes	X No			
ŧ	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942 (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942) all years listed, answer 'No' and attach statement — see instructions.)			2 b	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 $\stackrel{\triangleright}{}$ 20 , 20 , 20 , 20	here				
3 a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	Yes	X No			
ŧ	olf '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 approve 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)	d		3 Ь	N	/A
4 a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?			4 a		Х
t	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	# 10 m	X
BAA			Fo	rm 99	0-PF (

Form 990-PF (2012) The Morrissey Family Part VILB Statements Regarding Activities			20-25	07881 Page
		1 4/20 May be Req	uirea (continuea)	10.150 service processors from 20.00
5 a During the year did the foundation pay or incu(1) Carry on propaganda, or otherwise attempt		in (section 4945(e))?	☐ Yes 🗓	No
(2) Influence the outcome of any specific pub	lic election (see section	, , , , , , , , , , , , , , , , , , , ,		
on, directly or indirectly, any voter registra (3) Provide a grant to an individual for travel,	ation drive?		H F	No No
(4) Provide a grant to an organization other the in section 509(a)(1), (2), or (3), or section	nan a charitable, etc, or 4940(d)(2)? (see instri	rganization described	☐ Yes [X	No
(5) Provide for any purpose other than religio	us, charitable, scientific	c, literary, or		
educational purposes, or for the prevention b If any answer is 'Yes' to 5a(1)-(5), did any of described in Regulations section 53 4945 or in	-			No
(see instructions)? Organizations relying on a current notice rega			▶ [5b N/A
c If the answer is 'Yes' to question 5a(4), does tax because it maintained expenditure respon	the foundation claim ex		N/A Yes	No
If 'Yes,' attach the statement required by Regi	- •	5-5(d)	M/A [] les [
6 a Did the foundation, during the year, receive ar on a personal benefit contract?			∐Yes X	No
b Did the foundation, during the year, pay prem If 'Yes' to 6b, file Form 8870	iums, directly or indirec	tly, on a personal bene	fit contract?	6b X
7a At any time during the tax year, was the found	dation a party to a proh	ibited tax shelter transa	ection? Yes X	No S
b If 'Yes,' did the foundation receive any procee	ds or have any net inco	ome attributable to the	🖵 🗀	N/A 7b
Part VIII Information About Officers, D	_			
and Contractors	, , , , , , , , , , , , , , , , , , , ,		,	p.03000,
1 List all officers, directors, trustees, foundation	n managers and their	compensation (see inst	ructions).	
(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
Marla Morrisey	President &	0.	0.	0
P.O. Box 6801	0			
Los Osos, CA 93412				
Betty Morrisey P.O. Box 6801	Secretary & 0	0.	0.	0
Los Osos, CA 93412				
2 Compensation of five highest-paid employees (of	her than those included	on line 1 – see instructio	ns). 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
<u>None</u>				
Total number of other employees and area 650,000			<u> </u>	ļ
Total number of other employees paid over \$50,000	TEEA0306L 1	2/25/12		Form 990-PF (2012)

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Pa	-2507881 Page 7 nid Employees,
and Contractors (continued)	
3 Five highest-paid independent contractors for professional services (see instructions). If none, enter 'NONE.	
(a) Name and address of each person paid more than \$50,000 (b) Type of service	(c) Compensation
None	
Total number of others receiving over \$50,000 for professional services	P 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	
<u></u>	
	· – –
2	
3	
4	
Part IX-B: Summary of Program-Related Investments (see instructions)	
Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
N/A	. – –
	. – –
2	
All other program-related investments See instructions	
3	
Total. Add lines 1 through 3	Form 990-PF (2012)
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Forn	1990-PF (2012) The Morrissey Family Foundation, Inc.	20-250788	1 Page 8
Pai	Minimum Investment Return (All domestic foundations must complete this part. see instructions.)	Foreign four	ndations,
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc, purposes Average monthly fair market value of securities.	1 a	
t	Average of monthly cash balances	1 b	757,748.
(Fair market value of all other assets (see instructions)	1 c	
•	Total (add lines 1a, b, and c)	1 d	757,748.
€	Reduction claimed for blockage or other factors reported on lines 1a and 1c		
	(attach detailed explanation)	o. 85	
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	757,748.
4	Cash deemed held for charitable activities Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	11,366.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	746,382.
6	Minimum investment return. Enter 5% of line 5	6	37,319.
Par	Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private op	erating found	dations
<u> </u>	and certain foreign organizations check here ► X and do not complete this part		
1	Minimum investment return from Part X, line 6 N/A	1 1	· - · -
2ε	Tax on investment income for 2012 from Part VI, line 5	7,	
t	Income tax for 2012 (This does not include the tax from Part VI)		
c	Add lines 2a and 2b	2 c	
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	7	
Par	t XII Qualifying Distributions (see instructions)		
1 a	Amounts paid (including administrative expenses) to accomplish charitable, etc. purposes Expenses, contributions, gifts, etc. – total from Part I, column (d), line 26	1 a	38,824.
t	Program-related investments — total from Part IX-B	1 b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc, purposes	2	
3 a	Amounts set aside for specific charitable projects that satisfy the Suitability test (prior IRS approval required)	3 a	
Ŀ	Cash distribution test (attach the required schedule)	3 Б	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	38,824.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions)	5	
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	38,824.
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the qualifies for the section 4940(e) reduction of tax in those years	foundation	
BAA		Fo	rm 990-PF (2012)

TEEA0308L 12/22/12

Form **990-PF** (2012)

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ed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed d Subtract line 6c from line 6b Taxable amount — see instructions e Undistributed income for 2011 Subtract line 4a from line 2a Taxable amount — see instructions f Undistributed income for 2012 Subtract lines 4ad and 5 from line 1 This amount must be distributed in 2013 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions) 8 Excess distributions carryover from 2007 not applied on line 5 or line 7 (see instructions) 9 Excess distributions carryover to 2013. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9 a Excess from 2008 b Excess from 2009 c Excess from 2010 d Excess from 2011 e Excess from 2012	ì					
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amount — see instructions e Undistributed income for 2011 Subtract line 4a from line 2a Taxable amount — see instructions f Undistributed income for 2012 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2013 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b(1)(F) or 4942(g)(3) (see instructions) 8 Excess distributions carryover from 2007 not applied on line 5 or line 7 (see instructions) 9 Excess distributions carryover to 2013. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9 a Excess from 2008 b Excess from 2009 c Excess from 2010 d Excess from 2011 e Excess from 2012		has been issued, or on which the section				All Commence
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8 Excess distributions carryover from 2007 not applied on line 5 or line 7 (see instructions) 9 Excess distributions carryover to 2013. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9 a Excess from 2008 b Excess from 2009 c Excess from 2010 d Excess from 2011 e Excess from 2012	7	corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)				
10 Analysis of line 9 a Excess from 2008 b Excess from 2010 c Excess from 2011 e Excess from 2012	8	Excess distributions carryover from 2007 not			The second secon	The state of the s
a Excess from 2008 b Excess from 2009 c Excess from 2010 d Excess from 2011 e Excess from 2012	9	Excess distributions carryover to 2013. Subtract lines 7 and 8 from line 6a				
b Excess from 2009 c Excess from 2010 d Excess from 2011 e Excess from 2012	10	Analysis of line 9	, 11	/		/ -
c Excess from 2010 d Excess from 2011 e Excess from 2012			,	, · · ·		**************************************
d Excess from 2011 e Excess from 2012				` '		
e Excess from 2012						
			•			
					L	Form QQ1-PF (2012)

Form 990-PF (2012) The Morrissey Fa	mily Foundatio	on Inc		20-2507881	Page 10
Part XIV Private Operating Founda	tions (see instruc	tions and Part \	VII-A, guestion 9	3)	
1 a If the foundation has received a ruling or detus effective for 2012, enter the date of the	ermination letter that it ruling	is a private operating	foundation, and the	ruling	2/18/06
b Check box to indicate whether the founda	tion is a private opera	iting foundation des		X 4942(j)(3) or	4942(j)(5)
2a Enter the lesser of the adjusted net income from Part I or the minimum	Tax year		Prior 3 years		
investment return from Part X for	(a) 2012	(b) 2011	(c) 2010	(d) 2009	(e) Total
each year listed	20,111.	21,592.	23,112.	24,682.	89,497.
b 85% of line 2a	17,094.	18,353.	19,645.	20,980.	76,072.
c Qualifying distributions from Part XII, line 4 for each year listed	38,824.	49,249.	57,085.	46,677.	191,835.
d Amounts included in line 2c not used directly for active conduct of exempt activities					0.
 Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c 	38,824.	49,249.	57,085.	46,677.	191,835.
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	24,879.	23,693.	23,234.	23,692.	95,498.
c 'Support' alternative test — enter					_
 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 assets at any time during the	(Complete this p ne year — see inst	art only if the for	oundation had	5,000 or more	in
Information Regarding Foundation Mana List any managers of the foundation who have close of any tax year (but only if they have Marla Morrisey	e contributed more than	n 2% of the total con an \$5,000) (See so	tributions received by ection 507(d)(2))	the foundation befo	ore the
b List any managers of the foundation who own a partnership or other entity) of which the None	n 10% or more of the sto foundation has a 10%	ock of a corporation 6 or greater interes	(or an equally large p t	portion of the owners	ship of
2 Information Regarding Contribution, Gra	nt, Gift, Loan, Schola	rship, etc, Program	is:		
Check here 🟲 🛛 If the foundation only ma	akes contributions to pre	eselected charitable	organizations and do	es not accept unsoli	cited
requests for funds If the foundation make complete items 2a, b, c, and d	es gifts, grants, etc (se	ee instructions) to i	ndıvıduals or organı	zations under othe	r conditions,
a The name, address, and telephone number of	r e-mail of the person to	o whom applications	should be addressed	1	

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:

Page 11

3 Grants and Contributions Paid During the Y	ear or Approved for Fut	ure Paymen	it — — — —	r·····
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	substantial contributor	recipient	Contribution	
a Paid during the year				
Plover Birds			Conservancy	6,197.
,				
Steelhead			Conservancy	1,907.
,				
MEGA			Conservancy	28,035.
,				
Wilderness Research			Conservancy	810.
,			Conservancy	010.
•				
Veterans in Wilderness			Education	675.
•				
Misc Grants			S	1 200
			Conservancy	1,200.
,				
				•
Total			► 3a	38,824.
b Approved for future payment				
	l			
Total	1		► 3b	

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated 1 Program service revenue.			d business income	Exclude	d by section 512, 513, or 514	(e)		
		(a) Business code	(b) Amount	(c) Exclu- sion	(d) Amount	Related or exempt function income (See instructions.)		
a a	ram service revenue.			code		<u> </u>		
b		<u> </u>		-				
c			· · · · · · · · · · · · · · · · · · ·					
d								
e								
f				ļ				
	and contracts from government agencies							
	bership dues and assessments			ļ		00 111		
	st on savings and temporary cash investments lends and interest from securities			-		20,111.		
	ental income or (loss) from real estate.	3.43.55	1. 2 1/2 1/2 1/2 1/2 1/2 1/2 1/2 1/2 1/2 1	3534 KM				
	-financed property	2000 00 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	*/ ' \$ \$ % ZWO	150 . Tolera	1			
	debt-financed property	<u> </u>						
6 Net rea	ntal income or (loss) from personal property							
7 Other	r investment income							
	r (loss) from sales of assets other than inventory							
	ncome or (loss) from special events							
	s profit or (loss) from sales of inventory		24. 24. 27. 37. 37. 37. 37. 37. 37. 37. 37. 37. 3	OLX POST				
	r revenue.	Service Services		% MA				
a b		-						
с С		+	· · -					
d								
е			-					
12 Subto	otal Add columns (b), (d), and (e)					20,111.		
	. Add line 12, columns (b), (d), and (e)				13	20,111.		
(See works	sheet in line 13 instructions to verify calculati	ons)						
Daid VIII				4 D	neae			
≅atr⊻∧i	Relationship of Activities to the	e Accompli	Ishment of Exemp	t Purp	0363			
Line No.	Explain below how each activity for which is accomplishment of the foundation's exempt	<u> </u>	<u> </u>			tly to the nstructions)		
Line No.	-	<u> </u>	<u> </u>			tly to the nstructions)		
Line No. ▼	-	<u> </u>	<u> </u>			tly to the nstructions)		
Line No. ▼	-	<u> </u>	<u> </u>			tly to the nstructions)		
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Line No. ▼	-	<u> </u>	<u> </u>		· · · · · · · · · · · · · · · · · · ·	lly to the nstructions)		
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Line No. ▼	-	<u> </u>	<u> </u>		· · · · · · · · · · · · · · · · · · ·	ily to the nstructions)		
Line No. ▼	-	<u> </u>	<u> </u>		· · · · · · · · · · · · · · · · · · ·	lly to the nstructions)		
Line No. ▼	-	<u> </u>	<u> </u>		· · · · · · · · · · · · · · · · · · ·	lly to the nstructions)		

Form 990-PF (2012) The Morrissey Family Foundation, Inc. 20-2507881 Part XVII. Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

describe relating to a Transfer (1) Cash (2) Other tra (1) Sale (2) Purc (3) Rent (4) Reim (5) Loar (6) Perfe c Sharing diff the anthe goods	id in section 501(c) of to political organizations from the reporting in erassets ansactions as of assets to a none thases of assets from tall of facilities, equipments or loan guarantees or facilities, equipments of the all so, other assets, or sen	of the Code (other the code) foundation to a nor charitable exempt on a noncharitable exempt on a noncharitable exempt, or other assements s or membership or the company of the code is 'Yes,' composed given by the relations?	xempt organization	organization of ganization of management of the control of the con	n (b) should alw	vays show the fair	1 b (1) 1 b (2) 1 b (3) 1 b (4) 1 b (5) 1 c	Yes No X X X X X X X X X X X X X X X X X X X	
(a) Line no.	(b) Amount involved		haritable exempt organizati		 	sfers, transactions, and		noments	-
N/A	(P) Minorite managen	(C) Name of florid	maritable exempt organizati	vii (a) pescription or trail	isicis, transactions, and	silaring arran	igernents	_
1/ Δ				_					_
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describe	indation directly or ind d in section 501(c) o complete the followir	of the Code (other th	or related to, one or n nan section 501(c)(3)	nore tax-exem or in section	ot organizations n 527?		Yes	No X	
	Name of organization	on	(b) Type of organiz	zation	(c) Description of re	ationship		_
N/A									
					ļ				_
						<u> </u>			_
									_
1					<u> </u>				_
ign Under po	and deputible for tallation of	e that I have examined this of neparer (other than tax	s return, including accompar payer) is based on all inform	nying schedules ai mation of which pr	nd statements, and to eparer has any knowl	the best of my knowledge edge		RS discuss	
lere Signa	are if officer or trustee		Date 1		President itle		(see instri	shown below fuctions)? Yes No	•
15 4	Print/Type preparer's nam	ne	Preparer's signature		Date	Check X if	PTIN		-
Paid	Scott R. Hay:	ner	Scott R. Hay	ner	8-22-1		P00283	039	
reparer		ayner, Hayne					407814		_
Jse Only	_	105 Morro Ro							_
	· —		A 93422-4253			Phone no (805	5) 466-8	3800	
BAA	·	•			······			-PF (2012)	_
								•	

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		Employer identification number
The Morrissey Family Foundati	ion, Inc.	20-2507881
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	X 501(c)(3) exempt private foundation	
	4947(a)(1) nonexempt charitable trust treated as a privi	ate foundation
	501(c)(3) taxable private foundation	
	The state of the s	
Check if your organization is covered by the G	eneral Rule or a Special Rule	
	•	Consist Dute. See materiations
	panization can check boxes for both the General Rule and a S	pecial Rule See instructions.
General Rule		
X 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)		
contributor (Complete Farts Fallu II)		
Consid Dalas		
Special Rules		
509(a)(1) and 170(b)(1)(A)(vi) and receive	Form 990 or 990-EZ that met the 33-1/3% support test of the d 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, Par	t VIII, line 1h or (ii) Form 990-EZ, line 1. Complete Parts I ar	nd II
For a section 501(c)(7), (8), or (10) organization	on filing Form 990 or 990-EZ that received from any one contribut	or, during the year,
total contributions of more than \$1,000 for the prevention of cruelty to children or anii	use exclusively for religious, charitable, scientific, literary, or mals. Complete Parts I. II. and III	educational purposes, or
	, , ,	or, during the year.
contributions for use exclusively for religious,	on filing Form 990 or 990-EZ that received from any one contribut charitable, etc. purposes, but these contributions did not total to r	nore than \$1,000
purpose Do not complete any of the parts un	tributions that were received during the year for an <i>exclusively</i> relless the General Rule applies to this organization because it recei	igious, charitable, etc, ved nonexclusively
religious, charitable, etc, contributions of \$		▶\$
Caution: As examination that is not covered by the Coneval	Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or	000 DE) h. t. t
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 (F	orm 990, 990-EZ, or 990-PF)	
BAA For Paperwork Reduction Act Notice, so	ee the Instructions for Form 990, 990EZ, Schedule B (I	Form 990, 990-EZ, or 990-PF) (2012)
or 990-PF.		

Schedule	B (Form 990, 990-EZ, or 990-PF) (2012)	Page_	1 of 1 of Part 1
Name of org		1	r identification number
	Contributors (see instructions) Use duplicate copies of Part I if additional space is needed		507881
(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	Marla Morrisey		Person X Payroll
	1303 Higuera Street	\$45,000.	· 🗀
	San Luis Obispo, CA 93401		(Complete Part II if there is a noncash contribution)
(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
2	Betty Morrisey		Person X Payroll
	1303 Higuera Street	\$50,000.	Noncash
	San Luis Obispo, CA 93401		(Complete Part II if there is a noncash contribution)
(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$ 	Person Payroll Complete Part II if there is a noncash contribution)
(a)	(b)	(c) Total	(d)
Number	Name, address, and ZIP + 4	Total contributions	Type of contribution
Number	Name, address, and ZIP + 4	Total contributions	Person Payroll Complete Part II if there is a noncash contribution Payroll Part II if there is
Number (a) Number	Name, address, and ZIP + 4 Name, address, and ZIP + 4 Name, address, and ZIP + 4	contributions	Person Payroli Noncash Complete Part II if there is
Number	Name, address, and ZIP + 4	\$ (c)	Person Payroll Noncash (Complete Part II if there is a noncash contribution) (d) Type of contribution Person Payroll Noncash (Complete Part II if there is
Number	Name, address, and ZIP + 4	\$ (c) Total (c) Total	Person Payroli Noncash (Complete Part II if there is a noncash contribution) (d) Type of contribution Person Payroll Noncash
(a) Number	Name, address, and ZIP + 4 Name, address, and ZIP + 4 Name, address, and ZIP + 4 (b)	\$(c) Total contributions	Person Payroli Noncash Complete Part II if there is a noncash contribution Person Payroll Noncash Complete Part II if there is a noncash contribution.
(a) Number	Name, address, and ZIP + 4 Name, address, and ZIP + 4 Name, address, and ZIP + 4 (b)	\$ (c) Total contributions \$ (c) Total contributions	Person

Page

1 to

1 of Part II

Name of organization

The Morrissey Family Foundation, Inc.

Employer identification number

20-2507881

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
N/.	A		
		\$\$	
(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
-		<u> </u>	
(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

The Morrissey Family Foundation, Inc

1 to 1 of Par Employer identification number 20-2507881

		1-0 -000
Part III	Exclusively religious, charitable, etc, individual contributions to section 501(c)(7)	7), (8) or (10)
	organizations that total more than \$1,000 for the year. Complete columns (a) through (e) a	nd the following line entry.
	For organizations completing Part III, enter total of exclusively religious, charitable, etc,	
	pontributions of £1,000 or loss for the year /Catas this information and Caramaturations	

N/A

	Use duplicate copies of Part III if additional	space is needed		, t <u>II/A</u>
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift		(d) Description of how gift is held
	N/A			
		(e) Transfer of gift		
	Transferee's name, addres	Transfer of gift is, and ZIP + 4	Relati	onship 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, addres	i ransfer of gift is, and ZIP + 4	Relati	onship of transferor to transferee
(a) No. from	(b) Purpose of gift	(c) Use of gift		(d) Description of how gift is held
Part I	Furpose of gift	Ose of gift		Description of now gift is neid
		(e) Transfer of gift		
	Transferee's name, addres	ss, and ZIP + 4	Relati	onship 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, addres	Transfer of gift s, and ZIP + 4	Relati	onship of transferor to transferee

2012	Federal Statements	Page 1
	The Morrissey Family Foundation, Inc.	20-2507881
Statement 1 Form 990-PF, Part I, Line 16b Accounting Fees	(a) (b) Net (c) Expenses Investment Adjusted	(d) Charitable
ННМС	per Books Income Net Income	Purposes
Statement 2 Form 990-PF, Part I, Line 18 Taxes		
CA Attorney General CA Franchise Tax Board IRS	(a) (b) Net (c) Expenses Investment Adjusted per Books Income Net Income \$ 25. 10. 216. \$ 0. Total \$ 0.	(d) Charitable Purposes \$ 0.
Statement 3 Form 990-PF, Part I, Line 23 Other Expenses		
Bank Fees Office Expense Program Investigation Promotion	(a) (b) Net (c) Expenses per Books Investment Adjusted Net Income \$ 25. 3,980. 700. 4,405. Total \$ 9,110. \$ 0. \$ 0.	(d) Charitable Purposes
Statement 4 Form 990-PF, Part II, Line 14 Land, Buildings, and Equipme	Accum. Book	Fair Market
<u>Category</u> Furniture and Fixtures	Basis Deprec. Value \$ 691. \$ 691. \$ 0. \$ Total \$ 691. \$ 691. \$ 0. \$	Value 0. 0. 0.
	<u> </u>	

2012 Page 2 **Federal Statements** 20-2507881 The Morrissey Family Foundation, Inc. Statement 5 Form 990-PF, Part III, Line 5 Other Decreases Net Unrealized Gains or Losses on Investments 68,455. 68,455. Total \$\frac{\$}{\$}