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 OCT 1, 2012 **, and ending** SEP 30, 2013

Name of foundation: ARISE CHARITABLE TRUST

A Employer identification number: 91-1350780

Number and street (or P O box number if mail is not delivered to street address): P O BOX 1014 | Room/suite:

B Telephone number: 360-331-5792

City or town, state, and ZIP code: FREELAND, WA 98249-1014

C If exemption application is pending, check here ▶ ☐

G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change

D 1. Foreign organizations, check here ▶ ☐
2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐

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

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

I Fair market value of all assets at end of year *(from Part II, col. (c), line 16)* ▶$ 4,670,278.

J Accounting method: ☐ Cash [X] Accrual ☐ Other (specify) *(Part I, column (d) must be on cash basis.)*

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

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))

		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received			N/A	
	2 Check ▶ [X] if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	2.	2.		STATEMENT 1
	4 Dividends and interest from securities	145,704.	145,704.		STATEMENT 2
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	114,028.			
	b Gross sales price for all assets on line 6a 722,363.				
	7 Capital gain net income (from Part IV, line 2)		114,028.		
	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	366,599.	0.		STATEMENT 3
	12 **Total.** Add lines 1 through 11	626,333.	259,734.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	18,187.	5,400.		12,787.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees				
	b Accounting fees				
	c Other professional fees STMT 4	23,211.	23,211.		0.
	17 Interest				
	18 Taxes STMT 5	2,311.	0.		2,311.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses STMT 6	2,535.	0.		2,535.
	24 **Total operating and administrative expenses.** Add lines 13 through 23	46,244.	28,611.		17,633.
	25 Contributions, gifts, grants paid	198,854.			190,462.
	26 **Total expenses and disbursements.** Add lines 24 and 25	245,098.	28,611.		208,095.
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	381,235.			
	b **Net investment income** (if negative, enter -0-)		231,123.		
	c **Adjusted net income** (if negative, enter -0-)			N/A	

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Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	7,055.	15,149.	15,149.
	2 Savings and temporary cash investments	22,470.	97,994.	97,994.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock STMT 8	2,949,087.	3,283,885.	3,283,885.
	c Investments - corporate bonds STMT 9	1,148,527.	1,120,548.	1,120,548.
	11 Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans STMT 10	128,361.	127,949.	127,949.
	13 Investments - other			
	14 Land, buildings, and equipment: basis ▶			
	Less accumulated depreciation ▶			
	15 Other assets (describe ▶ INTEREST RECEIVABLE)	24,439.	24,753.	24,753.
	16 **Total assets** (to be completed by all filers)	4,279,939.	4,670,278.	4,670,278.
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable	43,180.	51,573.	
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶ STATEMENT 11)	0.	711.	
	23 **Total liabilities** (add lines 17 through 22)	43,180.	52,284.	
Net Assets or Fund Balances	**Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.**			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	1,717,384.	2,098,619.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	2,519,375.	2,519,375.	STATEMENT 7
	30 **Total net assets or fund balances**	4,236,759.	4,617,994.	
	31 **Total liabilities and net assets/fund balances**	4,279,939.	4,670,278.	

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	4,236,759.
2 Enter amount from Part I, line 27a	2	381,235.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	4,617,994.
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	4,617,994.

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				
b	SEE ATTACHED STATEMENT			
c				
d				
e				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a				
b				
c				
d				
e	722,363.		608,335.	114,028.

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

	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a				
b				
c				
d				
e				114,028.

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	114,028.
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	178,898.	3,961,318.	.045161
2010	191,440.	3,902,247.	.049059
2009	155,006.	3,752,265.	.041310
2008	144,531.	3,221,839.	.044860
2007	140,410.	3,419,170.	.041066

2 **Total** of line 1, column (d)	2	.221456
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	.044291
4 Enter the net value of noncharitable-use assets for 2012 from Part X, line 5	4	4,397,661.
5 Multiply line 4 by line 3	5	194,777.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	2,311.
7 Add lines 5 and 6	7	197,088.
8 Enter qualifying distributions from Part XII, line 4	8	208,095.

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

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ [ ] and enter "N/A" on line 1. Date of ruling or determination letter: ________ (attach copy of letter if necessary-see instructions)				
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ [X] and enter 1% of Part I, line 27b			1	2,311.
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).				
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			2	0.
3	Add lines 1 and 2			3	2,311.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			4	0.
5	**Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter -0-			5	2,311.
6	Credits/Payments:				
a	2012 estimated tax payments and 2011 overpayment credited to 2012	6a	1,600.		
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	1,600.
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	711.
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶			10	
11	Enter the amount of line 10 to be: **Credited to 2013 estimated tax** ▶ **Refunded** ▶			11	

Part VII-A Statements Regarding Activities

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

Part VII-A Statements Regarding Activities *(continued)*

			Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ▶ ARISECHARITABLETRUST.ORG

14 The books are in care of ▶ EDWARDS & ASSOCIATES, CPA'S Telephone no. ▶360-331-5792

Located at ▶5492 S HARBOR AVE, P O BOX 340, FREELAND, WA ZIP+4 ▶98249

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

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

			Yes	No
16	At any time during calendar year 2012, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		X
	See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ▶			

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

			Yes	No
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			
1a	During the year did the foundation (either directly or indirectly):			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☒ Yes ☐ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?	1b		X
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2012?	1c		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):			
a	At the end of tax year 2012, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2012? ☐ Yes ☒ No			
	If "Yes," list the years ▶ ______, ______, ______, ______			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement - see instructions.) N/A	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. ▶ ______, ______, ______, ______			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2012 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969; **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2012.)* N/A	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2012?	4b		X

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

5a During the year did the foundation pay or incur any amount to:
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No
(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No
(3) Provide a grant to an individual for travel, study, or other similar purposes? ☒ Yes ☐ No
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? ☐ Yes ☒ No
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)? **5b** X
Organizations relying on a current notice regarding disaster assistance check here ▶ ☐

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? N/A ☐ Yes ☐ No
If "Yes," attach the statement required by Regulations section 53.4945-5(d).

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

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b** X
If "Yes" to 6b, file Form 8870.

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

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

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 12		18,187.	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

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	4,376,155.
b	Average of monthly cash balances	1b	88,475.
c	Fair market value of all other assets	1c	
d	**Total** (add lines 1a, b, and c)	1d	4,464,630.
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	4,464,630.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	66,969.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	4,397,661.
6	**Minimum investment return.** Enter 5% of line 5	6	219,883.

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	219,883.
2a	Tax on investment income for 2012 from Part VI, line 5 — 2a: 2,311.		
b	Income tax for 2012. (This does not include the tax from Part VI.) — 2b:		
c	Add lines 2a and 2b	2c	2,311.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	217,572.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	217,572.
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	217,572.

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	208,095.
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	208,095.
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	2,311.
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	205,784.

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				217,572.
2 Undistributed income, if any, as of the end of 2012				
a Enter amount for 2011 only			60,885.	
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: ▶ $ 208,095.				
a Applied to 2011, but not more than line 2a			60,885.	
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				147,210.
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 instr.			0.	
f Undistributed income for 2012. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2013				70,362.
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(j)(3) or ☐ 4942(j)(5)

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

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

1 **Information Regarding Foundation Managers:**

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

JUDITH P YEAKEL

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 13

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				
INDIVIDUALS - SEE ATTACHED SCHEDULE	NONE	N/A	EDUCATIONAL SCHOLARSHIPS	94,842.
ORGANIZATIONS - SEE ATTACHED SCHEDULE	NONE	PUBLIC CHARITY	VARIOUS	95,620.
Total			▶ 3a	190,462.
b Approved for future payment				
INDIVIDUALS - SEE ATTACHED SCHEDULE - LAST YEARS DUE IN FUTURE YEARS	NONE			-43,180.
INDIVIDUALS - SEE ATTACHED SCHEDULE DUE IN FUTURE YEARS	NONE	N/A	EDUCATIONAL SCHOLARSHIPS	51,572.
Total			▶ 3b	8,392.

Part XVI-A **Analysis of Income-Producing Activities**

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	2.	
4 Dividends and interest from securities			14	145,704.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income			18	366,599.	
8 Gain or (loss) from sales of assets other than inventory					114,028.
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)		0.		512,305.	114,028.

13 Total. Add line 12, columns (b), (d), and (e) 13 626,333.

(See worksheet in line 13 instructions to verify calculations.)

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

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

Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of:			
	(1) Cash	1a(1)		X
	(2) Other assets	1a(2)		X
b	Other transactions:			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
	(3) Rental of facilities, equipment, or other assets	1b(3)		X
	(4) Reimbursement arrangements	1b(4)		X
	(5) Loans or loan guarantees	1b(5)		X
	(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X

d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.

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

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

Sign Here

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

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

Signature of officer or trustee — Date 10/7/13 — Title Trustee

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☒ if self-employed	PTIN
CHARLES W. EDWARDS	CHARLES W. EDWARD	10/7/13		P01318875

Firm's name ▶ EDWARDS & ASSOCIATES, CPA'S — Firm's EIN ▶ 91-1197949

Firm's address ▶ P O BOX 340 FREELAND, WA 98249 — Phone no. 360-331-5792

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	KRAFT FOOD GROUP	P	08/15/12	10/01/12
b	KRAFT FOOD GROUP	P	08/15/12	11/20/12
c	BRISTOL MYERS SQUIBB	P	06/28/07	11/30/12
d	EATON CORP	P	02/08/12	12/03/12
e	DELL	P	11/20/12	03/25/13
f	JOHNSON & JOHNSON	P	09/23/10	08/16/13
g	CAPITAL ONE	P	05/07/13	08/01/13
h	MORGAN STANLEY BOND	P	07/12/11	10/15/12
i	MORGAN STANLEY BOND	P	07/31/12	10/15/12
j	MERRILL LYNCH BOND	P	10/20/08	01/03/13
k	GENWORTH FINANCIAL BOND	P	10/15/12	01/22/13
l	GENWORTH FINANCIAL BOND	P	10/15/12	01/22/13
m				
n				
o				

	(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	32.		29.	3.
b	11,840.		11,410.	430.
c	47,899.		47,565.	334.
d	41,324.		41,215.	109.
e	87,299.		53,820.	33,479.
f	134,153.		92,924.	41,229.
g	68,910.		59,229.	9,681.
h	111,125.		106,202.	4,923.
i	19,912.		18,563.	1,349.
j	56,851.		51,516.	5,335.
k	77,133.		67,444.	9,689.
l	65,885.		58,418.	7,467.
m				
n				
o				

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a				3.
b				430.
c				334.
d				109.
e				33,479.
f				41,229.
g				9,681.
h				4,923.
i				1,349.
j				5,335.
k				9,689.
l				7,467.
m				
n				
o				

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	114,028.
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

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

SOURCE	AMOUNT
WELLS FARGO	2.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	2.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
MORGAN STANLEY DIVIDENDS	85,708.	0.	85,708.
MORGAN STANLEY INT BNDS/MMA	50,065.	0.	50,065.
MORTGAGE NOTES	9,931.	0.	9,931.
TOTAL TO FM 990-PF, PART I, LN 4	145,704.	0.	145,704.

FORM 990-PF OTHER INCOME STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME
UNREALIZED GAINS ON SECURITIES	366,599.	0.	
TOTAL TO FORM 990-PF, PART I, LINE 11	366,599.	0.	

FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
MORGAN STANLEY	23,211.	23,211.		0.
TO FORM 990-PF, PG 1, LN 16C	23,211.	23,211.		0.

FORM 990-PF TAXES STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FEDERAL INCOME TAXES	2,311.	0.		2,311.
TO FORM 990-PF, PG 1, LN 18	2,311.	0.		2,311.

FORM 990-PF OTHER EXPENSES STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
POSTAGE	244.	0.		244.
PUBLICITY	285.	0.		285.
COPY	195.	0.		195.
DUES/SUBSCRIPTIONS	25.	0.		25.
INSURANCE	919.	0.		919.
OFFICE SUPPLIES	545.	0.		545.
LOAN ADMINISTRATIVE EXPENSES	320.	0.		320.
ROUNDING	2.	0.		2.
TO FORM 990-PF, PG 1, LN 23	2,535.	0.		2,535.

FORM 990-PF OTHER FUNDS STATEMENT 7

DESCRIPTION	(A) BEGINNING OF YEAR	(B) END OF YEAR
ENDOWMENT FUND	2,519,375.	2,519,375.
TOTAL TO FORM 990-PF, PART II, LINE 29	2,519,375.	2,519,375.

FORM 990-PF — CORPORATE STOCK — STATEMENT 8

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
STOCKS SEE ATTACHED SCH A	3,283,885.	3,283,885.
TOTAL TO FORM 990-PF, PART II, LINE 10B	3,283,885.	3,283,885.

FORM 990-PF — CORPORATE BONDS — STATEMENT 9

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
BONDS SEE ATTACHED SCH B	1,120,548.	1,120,548.
TOTAL TO FORM 990-PF, PART II, LINE 10C	1,120,548.	1,120,548.

FORM 990-PF — MORTGAGE LOANS — STATEMENT 10

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
MORTGAGES SEE ATTACHED SCH C	127,949.	127,949.
TOTAL TO FORM 990-PF, PART II, LINE 12	127,949.	127,949.

FORM 990-PF — OTHER LIABILITIES — STATEMENT 11

DESCRIPTION	BOY AMOUNT	EOY AMOUNT
FEDERAL INCOME TAXES PAYABLE	0.	711.
TOTAL TO FORM 990-PF, PART II, LINE 22	0.	711.

FORM 990-PF PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS STATEMENT 12

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN-SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
C. W. EDWARDS (EDWARDS & ASSOC,CPA'S) P O BOX 340 FREELAND, WA 98249	TRUSTEE/MGR 4.00	18,000.	0.	0.
CAROLYN CLIFF P O BOX 925 LANGLEY, WA 98260	TRUSTEE 0.10	187.	0.	0.
JUDITH P YEAKEL P O BOX 579 LANGLEY, WA 98260	TRUSTEE 0.00	0.	0.	0.
ANNE PETTIT 16956 185TH AVE WOODINVILLE, WA 98072	TRUSTEE 0.00	0.	0.	0.
BARBARA YEAKEL 633 NW 120TH SEATTLE, WA 98177	TRUSTEE 0.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		18,187.	0.	0.

FORM 990-PF GRANT APPLICATION SUBMISSION INFORMATION STATEMENT 13
PART XV, LINES 2A THROUGH 2D

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

CHARLES W. EDWARDS
P.O. BOX 340
FREELAND, WA 98249

TELEPHONE NUMBER

360-331-5792

EMAIL ADDRESS

INFO@ARISETRUST.ORG

FORM AND CONTENT OF APPLICATIONS

THE TRUST HAS ITS OWN FORMS TO BE PREPARED, SUBMIT REQUEST FOR FORMS TO CHARLES W. EDWARDS,P.O. BOX 1014, FREELAND, WA 98249 OR SEE WEBSITE ARISECHARITABLETRUST.ORG

ANY SUBMISSION DEADLINES

SEMI ANNUALY ON APRIL 1ST AND OCTOBER 1ST.

RESTRICTIONS AND LIMITATIONS ON AWARDS

AWARDS ARE LIMITED TO SOUTH WHIDBEY ISLAND, WA. ALSO LIMITED TO WOMEN AND TO THOSE ORGANIZATIONS THAT SERVE SOUTH WHIDBEY ISLAND WOMEN.

Arise Charitable Trust
EIN 91-1350780/Form 990 PF
Schedule of Investments
SCHEDULE A

Stocks	# of Shares	9/30/2013 Cost	9/30/2013 FMV	FMV/Cost Difference
3M Company	1,000	86,656	119,410	32,754
Abbott Labs	1,000	19,656	33,190	13,534
Abbvie	1,000	21,316	44,730	23,414
Alcoa Inc	8,000	93,084	64,960	-28,124
American Electric Power Co.	3,000	93,807	130,050	36,243
Amgen Inc	1,300	69,354	145,503	76,149
AT&T	2,000	58,674	67,640	8,966
Bank of NY Mellon Corp (BK)	1,000	43,631	30,190	-13,441
Campbell Soup	1,500	54,386	61,065	6,680
Caterpiller Inc (CAT)	1,000	99,539	83,400	-16,139
Cisco Systems Inc	4,000	82,840	93,724	10,884
Duke Energy Corp Holding Co.	1,113	45,763	74,326	28,563
Eaton Corp (ETN)	800	41,324	55,072	13,748
General Electric Co (GE)	5,000	87,039	119,450	32,412
General Mills Inc. (GIS)	2,000	44,528	95,840	51,312
Goldman Sachs Grp Inc (GS)	500	66,622	79,105	12,483
Honeywell International	1,500	78,375	124,560	46,185
JPMorgan Chase & Co (JPM)	1,500	68,983	77,535	8,552
Kimberly Clark Corp (KMB)	1,000	61,564	94,220	32,656
Men's Warehouse Inc.	2,000	46,075	68,100	22,025
Metlife Inc. (MET)	3,000	92,160	140,850	48,690
Microchip Technology Inc.	1,500	42,022	60,435	18,413
Morgan Stanley	1,000	21,202	26,950	5,748
Mondelez Intl	800	21,159	25,137	3,978
Paccar Inc (PCAR)	1,500	56,319	83,490	27,171
Pepsico Incorp. NC	1,000	44,070	79,500	35,430
Perrigo	600	75,648	74,028	-1,620
PNC Financial Svcs GP	2,000	124,815	144,900	20,085
Pulte Group Inc	4,000	55,494	66,000	10,506
Sempra Energy (SRE)	1,500	84,938	128,400	43,462
Spectra Energy Corp Com	1,670	32,997	57,164	24,167
State Street Corp	700	50,470	46,025	-4,445
Target Corp.	1,300	67,637	83,174	15,537
Toll Brothers	3,000	82,075	97,290	15,215
U S Bancorp Com New	3,000	76,364	109,740	33,377
US Bancorp 6% preferred	2,000	50,919	53,880	2,961
United Health Gp Inc	2,000	71,298	143,220	71,922
Washington Banking Co.	8,839	77,793	124,276	46,483
Weyerhaeuser Co. (WY)	2,702	74,116	77,358	3,242
Total Stocks		**2,464,709**	**3,283,887**	**819,178**

STATEMENT 10 - SCH C

Arise Charitable Trust
EIN 91-1350780/Form 990 PF
Schedule of Investments
SCHEDULE B

		Prior Year	Current Year	Current Year	
		Adjusted	Discount/(Pren	Adjusted	
Bonds	Quantity	Cost	Amortization	Cost	FMV
Brea CA Pub Fing Auth Water	85,000	85,891	(97)	85,794	93,806
Escrow Frontier 7.25%	50,000				
J P Morgan Chase 6%	100,000			96,000	93,750
Goldman Sachs	75,000	71,114	-	71,114	78,141
Fifth Third Bancorp	85,000	68,425	-	68,425	93,503
Barclays Ban k 5.14%	100,000	106,503	(486)	106,017	101,770
Kraft Foods Inc	50,000	51,916	(354)	51,562	58,147
Bank of America	100,000	88,650	-	88,650	112,852
Metlife Inc.	100,000	102,031	(296)	101,735	120,991
Verizon Communications	100,000	117,643	(2,475)	115,168	117,353
PNC Funding	100,000	109,911	(1,284)	108,627	120,658
Lincoln National	100,000	122,613	(2,913)	119,700	129,577
Totals		924,696	(7,905)	1,012,792	1,120,548

Arise Charitable Trust
EIN 91-1350780/Form 990 PF
Schedule of Investments
SCHEDULE C

	2013	2012
Habeck	**$ 127,950**	**$ 128,361**
Total Note Receivables	$ 127,950	$ 128,361

Part XV Supplementary information

Arise Charitable Trust
EIN 91-1350780/Form 990 PF

INDIVIDUALS

FIRST	LAST/ADDRESS	Rel to Manager	Stat of Recipient	Purpose of Grant	Prior Yr Grant	Current Yr Grant	Pd 10/1/12 thru 9/30/13	Reverted to Found	Remains to be Pd
Emmy	Atwood 401 Minnie Lane Langley, WA 98260	none	n/a	scholarship		2,500 00	2,500 00		-
Laura	Barrow 2725 Parkwood Dr Langley, WA 98260	none	n/a	scholarship	1,500 00	2,500 00	1,500 00		2,500 00
Kathleen	Bierce PO Box 932 Freeland, WA 98249	none	n/a	scholarship	317 00	-	317 00		-
Lennox	Bishop PO Box 1553 Langley, WA 98260	none	n/a	scholarship	-	2,500 00	2,500 00		-
Debbie	Bitts PO Box 915 Clinton, WA 98236	none	n/a	scholarship	1,000 00	-	-	1,000 00	-
Rebecca	Blankinship 8008 Maple Point Dr Clinton, WA 98236	none	n/a	scholarship	-	2,000 00	1,298 00		702 00
Nichole	Boyett PO Box 414 Freeland, WA 98249	none	n/a	scholarship		1,500 00	-		1,500 00
Amanda	Brager 5354 Mapleglen Rd Langley, WA 98260	none	n/a	scholarship	291 58	-	-	291 58	-
Krista	Bruning 2011 Jubilee Lane Freeland, WA 98249	none	n/a	scholarship	1,200 00	2,000 00	2,800 00		400 00
Hannah	Calderwood 4290 Deer Lake Rd Clinton, WA 98236	none	n/a	scholarship	-	2,500 00	2,500 00		-
Brittany	Campbell 4709 16th Ave NE Seattle, WA 98195	none	n/a	scholarship	1,500 00	2,500 00	1,500 00		2,500 00
Carrie	Carpenter 3173 Fox Spit Rd Langley, WA 98260	none	n/a	scholarship	500 00	-	500 00		-
Sarah	Cepowski 1673 Dorsey Dr Freeland, WA 98249	none	n/a	scholarship	1,500 00	-	-	1,500 00	-
Crystal	Coglas 350 Manchester Way #B-2 Langley, WA 98260	none	n/a	scholarship	1,256 50		1,256 50		-
Tazza	Colby PO Box 262 Langley, WA 98260	none	n/a	scholarship	-	1,500 00	807 88		692 12
Judith	Corbin 3697 Lagoon View Rd Greenbank, WA 98253	none	n/a	scholarship	789 63	1,500 00	1,890 88		398 75
Alissa	Coupe 6516 Wahl Road Freeland, WA 98249	none	n/a	scholarship	-	2,500 00	2,500 00		-

Part XV Supplementary information

Arise Charitable Trust
EIN 91-1350780/Form 990 PF

INDIVIDUALS

FIRST	LAST/ADDRESS	Rel to Manager	Stat of Recipient	Purpose of Grant	Prior Yr Grant	Current Yr Grant	Pd 10/1/12 thru 9/30/13	Reverted to Found	Remains to be Pd
Laurel	Cutrona PO Box 1106 Langley, WA 98260	none	n/a	scholarship	0 27	-	-	0 27	-
Kelsie	Dorpat PO Box 254 Freeland, WA 98249	none	n/a	scholarship	1,500 00		1,500 00		-
Ramona	Fankhauser 7441 Barred Owl Way Clinton, WA 98236	none	n/a	scholarship	1,500 00	-	1,500 00		-
Avery	Grant 218 NW 1sr St Coupeville, WA 98239	none	n/a	scholarship	-	1,500 00	1,500 00		-
Elizabeth	Grant PO Box 1106 Langley, WA 98260	none	n/a	scholarship	-	2,000 00	-		2,000 00
Christina	Hall 3256 East Harbor Rd Langley, WA 98260	none	n/a	scholarship	2,042 57	2,500 00	2,154 73		2,387 84
Tabitha	Helland 6232 Sunlight Shores Lane Clinton, WA 98236	none	n/a	scholarship	1,500 00	2,500 00	1,500 00		2,500 00
Sarah	Hellinger 5036 Chipshot Way Freeland, WA 98249	none	n/a	scholarship	300 94		300 94		-
Krista	Holmberg 1012 Woodside Lane Langley, WA 98260	none	n/a	scholarship	799 20	-	194 36	604 84	-
Julie	Hougom 7262 Fiske Rd Clinton, WA 98236	none	n/a	scholarship	-	2,000 00	2,000 00		-
Sara	Hutchinson-Puckett 5060 Chipshot Way Freeland, WA 98249	none	n/a	scholarship	1,800 94	2,000 00	1,800 94		2,000 00
Angelica	Janda 7382 Holst Road Clinton, WA 98236	none	n/a	scholarship	1,500 00	2,500 00	1,500 00		2,500 00
Danielle	Johnson 2442 Discovery Pl Langley, WA 98260	none	n/a	scholarship	-	1,500 00	1,500 00		-
Kimberly	Jones 4321 234th Place SE Bothell, WA 98021	none	n/a	scholarship	-	2,000 00	2,000 00		-
Natasha	Kamps 5061 Honeymoon Bay Rd Freeland, WA 98249	none	n/a	scholarship	1,500 00	2,000 00	1,500 00		2,000 00
Sophia	Larson-Wickman 4119 Campbell Rd Clinton, WA 98236	none	n/a	scholarship	-	2,500 00	-		2,500 00
Vicki	Lash 117 6th Streed Langley, WA 98260	none	n/a	scholarship	-	1,500 00	1,472 48		27 52

INDIVIDUALS

FIRST	LAST/ADDRESS	Rel to Manager	Stat of Recipient	Purpose of Grant	Prior Yr Grant	Current Yr Grant	Pd 10/1/12 thru 9/30/13	Reverted to Found	Remains to be Pd
Katharine	Locke 7340 S, Dead Goat Rd Clinton, WA 98236	none	n/a	scholarship	-	1,500 00	-		1,500 00
Jachen	Mackner 810 E Denny Apartments Seattle, WA 98122	none	n/a	scholarship	1,500 00	2,500 00	2,750 00		1,250 00
Holly	Magnuson 533 Bushpoint Rd Freeland, WA 98249	none	n/a	scholarship	-	1,500 00	1,121 78		378 22
Rebecca	Maher 4870 Breezefair Rd Freeland, WA 98249	none	n/a	scholarship	1,246 42	2,000 00	2,585 50		660 92
Kailee	Marin PO Box 774 Freeland, WA 98249	none	n/a	scholarship	-	2,500 00	-		2,500 00
Emily	Martin 2712 Parkwood Drive Langley, WA 98260	none	n/a	scholarship	1,500 00	2,500 00	1,500 00		2,500 00
Hannah	McCabe 1477 Lancaster Rd Freeland, WA 98249	none	n/a	scholarship	-	1,500 00	1,449 44		50 56
Alexis	Merculief 1287 Long Drive Freeland, WA 98249	none	n/a	scholarship	2,000 00	-	2,000 00		-
Sarah	Mergens 10875 Challenge La Mesa, CA 91941	none	n/a	scholarship	-	1,500 00	1,437 02		62 98
Amanda	Mosler 3317 Greenberry Hill Lane Clinton, WA 98236	none	n/a	scholarship	-	1,500 00	1,316 33		183 67
Theresa	Murray 6509 Wintergreen Dr Clinton, WA 98236	none	n/a	scholarship	-	2,000 00	-		2,000 00
Lindsey	Newman 4891 Reindeer Rd Freeland, WA 98249	none	n/a	scholarship	1,613 63	-	1,613 63		-
Samantha	O'Brochta 4946 Surlock Rd Freeland, WA 98249	none	n/a	scholarship	-	2,000 00	2,000 00		-
Crystal	Ogle PO Box 212 Clinton, WA 98236	none	n/a	scholarship	-	2,000 00	2,000 00		-
Nancy	Palmer 19284 St, Rte 525 Freeland, WA 98249	none	n/a	scholarship	-	1,500 00	1,500 00		-
Carly	Pate 5066 Bayview Rd Langley, WA 98260	none	n/a	scholarship	-	2,500 00	-		2,500 00
Emily	Perkins 7190 Terrapin Lane Clinton, WA 98236	none	n/a	scholarship	1,500 00	2,500 00	4,000 00		-

Part XV Supplementary information

Arise Charitable Trust
EIN 91-1350780/Form 990 PF

INDIVIDUALS

FIRST	LAST/ADDRESS	Rel to Manager	Stat of Recipient	Purpose of Grant	Prior Yr Grant	Current Yr Grant	Pd 10/1/12 thru 9/30/13	Reverted to Found	Remains to be Pd
Laura	Persaud PO Box 123 Langley, WA 98260	none	n/a	scholarship	-	2,500 00	-		2,500 00
Samantha	Pope 1415 Everette Lane Freeland, WA 98249	none	n/a	scholarship	2,158 50	-	2,158 50		-
Taylor	Pope 1415 Everette Lane Freeland, WA 98249	none	n/a	scholarship	-	1,500 00	1,500 00		-
Channy	Potter 6619 Maxwelton Rd Clinton, WA 98236	none	n/a	scholarship	1,000 00	2,500 00	3,500 00		-
Alexis	Price 2903 Grimm Rd Langley, WA 98260	none	n/a	scholarship	-	2,500 00	2,500 00		-
Amanda	Reeves 316 W Raye St Seattle, WA 98119	none	n/a	scholarship	2,000 00	-	2,000 00		-
Michele	Rempa 5389 Shadow Lane Freeland, WA 98249	none	n/a	scholarship	-	2,000 00	-		2,000 00
Corinne	Rouse-Kay 2782 Sun Vista Circle Clinton, WA 98236	none	n/a	scholarship	2,000 00	-	1,889.04	110 96	-
Bronwyn	Russell 4292 S Shirel Road Greenbank, WA 98253	none	n/a	scholarship	-	2,500 00	2,500 00		-
Karen	Stafford 2535 Hillis Drive Langley, WA 98260	none	n/a	scholarship	-	1,500 00	1,049 25		450 75
Trinda	Storey 20330 Bothell-Everett Hwy Bothell, WA 98012	none	n/a	scholarship	-	2,500 00	579 60		1,920 40
Cassandra	Thomson PO Box 1044 Freeland, WA 98249	none	n/a	scholarship	-	2,000.00	1,069 29		930 71
Morgan	Tuttle 3505 Rosedale St NW Gig Harbor, WA 98335	none	n/a	scholarship	-	2,000 00	2,000 00		-
Jessica	VanWetter 1520 N Laventure Rd #223 Mt Vernon, WA 98273	none	n/a	scholarship	1,237 51	2,000 00	1,386 18		1,851 33
Chantal	White 101 Memorial Pkway #530 Thousand Oaks, CA 91360	none	n/a	scholarship	-	2,500 00	2,500 00		-
Avery	Wilson 4357 Peaceful Place Langley, WA 98260	none	n/a	scholarship	-	2,000 00	-		2,000 00
Katy	Wilson-Albert 1217 A 9th Ave SE Olympia, WA 98501	none	n/a	scholarship	1,623 82	-	866 96	756 86	-

Part XV Supplementary information

Arise Charitable Trust
EIN 91-1350780/Form 990 PF

FIRST	LAST/ADDRESS	Rel to Manager	Stat of Recipient	Purpose of Grant	Prior Yr Grant	Current Yr Grant	Pd 10/1/12 thru 9/30/13	Reverted to Found	Remains to be Pd
INDIVIDUALS									
Anna	Wolcott PO Box 614 Langley, WA 98260	none	n/a	scholarship	-	2,000 00	275 00		1,725 00
Sayaka	Yokota 1920 1st Ave Apt # 301 Seattle, WA 98101	none	n/a	scholarship	1,501 47	-	1,501 47		-
Total Individuals					43,179 98	107,500 00	94,842 70	4,264 51	51,572 77
ORGANIZATION									
CADA	PO BOX 190 OAK HARBOR, WA 98277	"	"	"	"	20,000 00	20,000 00		
HELPING HANDS	PO BOX 661 LANGLEY, WA 98260					10,000 00	10,000 00		
HOPE	PO BOX 334 LANGLEY, WA 98260	"	"	"	"	13,700 00	13,700 00		
SKAGIT VALLEY COLLEGE	5611 S BAYVIEW RD LANGLEY, WA 98260	"	"	"	"	13,920 48	13,920 48		
SOUTH WHIDBEY CHILDREN'S CENTER	PO BOX 573 LANGLEY, WA 98260					30,000 00	30,000 00		
SOUTH WHIDBEY COOPERATIVE PRESCHOOL	PO BOX 713 LANGLEY, WA 98260					3,000 00	3,000 00		
SOUTH WHIDBEY FAMILY RESOURCE CENTER	PO BOX 346 LANGLEY, WA 98260					5,000 00	5,000 00		
	Total Orgainzations				-	95,620 48	95,620 48	-	-
	Total Individuals				43,179 98	107,500 00	94,842 70	4,264 51	51,572 77
	Total Individuals & Organizations				43,179 98	203,120 48	190,463 18	4,264 51	51,572 77