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Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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

OMB No 1545-0052

2012

Open to Public Inspection

For calendar year 2012, or tax year beginning 12-01-2012 , and ending 11-30-2013

Name of foundation
BRUCE LINDORF MEMORIAL FOUNDATION

A Employer identification number
23-7061702

Number and street (or P O box number if mail is not delivered to street address) C/O 51 WEST CENTER 604
Room/suite

B Telephone number (see instructions)
(801) 426-0633

City or town, state, and ZIP code
OREM, UT 84057

C If exemption application is pending, check here ☐

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

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

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

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

I Fair market value of all assets at end of year *(from Part II, col. (c), line 16)* ▶$ 3,707,503

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

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

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

			(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc , received (attach schedule)	14,150			
	2	Check ▶ ☑ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments				
	4	Dividends and interest from securities	109,592	109,591		
	5a	Gross rents				
	b	Net rental income or (loss) ____				
	6a	Net gain or (loss) from sale of assets not on line 10				
	b	Gross sales price for all assets on line 6a ____				
	7	Capital gain net income (from Part IV, line 2)		246,686		
	8	Net short-term capital gain			246,686	
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)				
	12	**Total.** Add lines 1 through 11	123,742	356,277	246,686	
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc				
	14	Other employee salaries and wages	36,776		36,776	
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule)	5,338		5,338	
	c	Other professional fees (attach schedule)				
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	7,519		1,760	
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)	52,787	36,279		16,508
	24	**Total operating and administrative expenses.** Add lines 13 through 23	102,420	36,279	43,874	16,508
	25	Contributions, gifts, grants paid	263,590			263,590
	26	**Total expenses and disbursements.** Add lines 24 and 25	366,010	36,279	43,874	280,098
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	-242,268			
	b	**Net investment income** (if negative, enter -0-)		319,998		
	c	**Adjusted net income** (if negative, enter -0-)			202,812	

Part II **Balance Sheets** Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		Beginning of year (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets				
1	Cash—non-interest-bearing		34,920	34,920
2	Savings and temporary cash investments	607,748	720,491	720,491
3	Accounts receivable ▶ Less allowance for doubtful accounts ▶			
4	Pledges receivable ▶ Less allowance for doubtful accounts ▶			
5	Grants receivable			
6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)			
7	Other notes and loans receivable (attach schedule) ▶ Less allowance for doubtful accounts ▶			
8	Inventories for sale or use			
9	Prepaid expenses and deferred charges			
10a	Investments—U S and state government obligations (attach schedule)			
b	Investments—corporate stock (attach schedule)			
c	Investments—corporate bonds (attach schedule)	2,712,656	2,679,020	2,952,092
11	Investments—land, buildings, and equipment basis ▶ Less accumulated depreciation (attach schedule) ▶			
12	Investments—mortgage loans			
13	Investments—other (attach schedule)			
14	Land, buildings, and equipment basis ▶ Less accumulated depreciation (attach schedule) ▶			
15	Other assets (describe ▶)			
16	**Total assets** (to be completed by all filers—see the instructions Also, see page 1, item I)	3,320,404	3,434,431	3,707,503
Liabilities				
17	Accounts payable and accrued expenses		631	
18	Grants payable			
19	Deferred revenue			
20	Loans from officers, directors, trustees, and other disqualified persons			
21	Mortgages and other notes payable (attach schedule)			
22	Other liabilities (describe ▶)			
23	**Total liabilities** (add lines 17 through 22)		631	
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	3,320,404	3,433,800	
25	Temporarily restricted			
26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☐ and complete lines 27 through 31.			
27	Capital stock, trust principal, or current funds			
28	Paid-in or capital surplus, or land, bldg , and equipment fund			
29	Retained earnings, accumulated income, endowment, or other funds			
30	**Total net assets or fund balances** (see page 17 of the instructions)	3,320,404	3,433,800	
31	**Total liabilities and net assets/fund balances** (see page 17 of the instructions)	3,320,404	3,434,431	

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	3,320,404
2	Enter amount from Part I, line 27a	2	-242,268
3	Other increases not included in line 2 (itemize) ▶	3	355,664
4	Add lines 1, 2, and 3	4	3,433,800
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	3,433,800

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)
1 a	Schwab 3148-8379 LT see stmt#1	P	2013-11-30	2013-11-30
b	Scwab 9597-6405 see stmt #2	P	2013-11-30	2013-11-30
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	796,349	0	617,797	178,552
b	1,134,894	0	1,066,760	68,134
c				
d				
e				

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
	(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	0	0	0	178,552
b	0	0	0	68,134
c				
d				
e				

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 / If (loss), enter -0- in Part I, line 7 }	2	246,686
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8	3	246,686

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 page 18 of 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	134,720	3,627,775	0 037136
2010	92,200	3,067,635	0 030056
2009	125,919	3,361,239	0 037462
2008	381,602	3,378,509	0 112950
2007	594,948	3,388,789	0 175564

2	**Total** of line 1, column (d).	2	0 393168
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years . . .	3	0 078634
4	Enter the net value of noncharitable-use assets for 2012 from Part X, line 5.	4	
5	Multiply line 4 by line 3.	5	
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	3,200
7	Add lines 5 and 6.	7	3,200
8	Enter qualifying distributions from Part XII, line 4.	8	280,098

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 page 18 of the instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1 Date of ruling or determination letter ________ **(attach copy of letter if necessary–see instructions)**				
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☑ and enter 1% of Part I, line 27b			1	3,200
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)				
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			2	0
3	Add lines 1 and 2			3	3,200
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			4	
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-			5	3,200
6	Credits/Payments				
a	2012 estimated tax payments and 2011 overpayment credited to 2012	6a	2,280		
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	2,280
8	Enter any **penalty** for underpayment of estimated tax Check here ☑ if Form 2220 is attached			8	22
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶			9	942
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** ▶	0	**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		No
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?	1b		No
	*If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year **(1)** On the foundation ▶ $ ________ **(2)** On foundation managers ▶ $ ________			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ ________			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities.*	2		No
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		No
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a	Yes	
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		No
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		No
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	Yes	
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	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶CA			
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	Yes	
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		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10		No

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

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		No
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		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	

Website address ▶N/A

14 The books are in care of ▶RONALD S LINDORF Telephone no ▶(801) 426-4366

Located at ▶51 WEST CENTER 604 OREM UT ZIP+4 ▶84057

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 |

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		No

See instructions for exceptions and filing requirements for Form TD F 90-22 1 If "Yes", enter the name of the foreign country ▶

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

	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.		Yes	No
1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☑ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☑ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☑ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☑ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☑ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☑ No			
b	If any answer is "Yes" to 1a(1)–(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?	1b		
	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		No
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 ▶ 20____ , 20____ , 20____ , 20____			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement—see instructions)	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ▶ 20____ , 20____ , 20____ , 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☑ No			
b	If "Yes," did it have excess business holdings in 2012 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969, **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2012.)*	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
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		No

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)? (see instructions) ☐ Yes ☑ No			
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☑ No			
b	If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53 4945 or in a current notice regarding disaster assistance (see instructions)?	**5b**		
	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? ☐ Yes ☐ No			
	If "Yes," attach the statement required by Regulations section 53.4945–5(d).			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☑ No			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	**6b**		No
	If "Yes" to 6b, file Form 8870.			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☑ No			
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	**7b**		

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

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

(a) Name and address	**(b)** Title, and average hours per week devoted to position	**(c)** Compensation **(If not paid, enter -0-)**	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
RONALD S LINDORF 51 W CENTER 604 OREM, UT 84057	President 5 00	0	0	0
TERRI LINDORF 51 W CENTER 604 OREM, UT 84057	Secretary 1 00	0	0	0

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

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

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

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

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".

(a) Name and address of each person paid more than $50,000	**(b)** Type of service	**(c)** Compensation
NONE		

Total number of others receiving over $50,000 for professional services . . . . ▶	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	
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	
2	
All other program-related investments See page 24 of the instructions 3	
Total. Add lines 1 through 3. . . . . ▶	

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

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

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	
2a	Tax on investment income for 2012 from Part VI, line 5	2a	3,200		
b	Income tax for 2012 (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	3,200
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	0

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	280,098
b	Program-related investments—total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	280,098
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	3,200
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	276,898

Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years

Part XIII Undistributed Income (see instructions)

		(a) Corpus	(b) Years prior to 2011	(c) 2011	(d) 2012
1 Distributable amount for 2012 from Part XI, line 7					0
2 Undistributed income, if any, as of the end of 2012					
a Enter amount for 2011 only.				178,371	
b Total for prior years 20___, 20___, 20___					
3 Excess distributions carryover, if any, to 2012					
a From 2007.	3,598				
b From 2008.					
c From 2009.					
d From 2010.					
e From 2011.	134,720				
f **Total** of lines 3a through e.		138,318			
4 Qualifying distributions for 2012 from Part XII, line 4 ▶ $ 280,098					
a Applied to 2011, but not more than line 2a					
b Applied to undistributed income of prior years (Election required—see instructions).					
c Treated as distributions out of corpus (Election required—see instructions).					
d Applied to 2012 distributable amount.					
e Remaining amount distributed out of corpus		280,098			
5 Excess distributions carryover applied to 2012 *(If an amount appears in column (d), the same amount must be shown in column (a).)*					
6 **Enter the net total of each column as indicated below:**					
a Corpus Add lines 3f, 4c, and 4e Subtract line 5		418,416			
b Prior years' undistributed income Subtract line 4b from line 2b					
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.					
d Subtract line 6c from line 6b Taxable amount —see instructions					
e Undistributed income for 2011 Subtract line 4a from line 2a Taxable amount—see instructions				178,371	
f Undistributed income for 2012 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2013					0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)					
8 Excess distributions carryover from 2007 not applied on line 5 or line 7 (see instructions) . . .		3,598			
9 **Excess distributions carryover to 2013.** Subtract lines 7 and 8 from line 6a		414,818			
10 Analysis of line 9					
a Excess from 2008. . . .					
b Excess from 2009. . . .					
c Excess from 2010. . . .					
d Excess from 2011. . . .	134,720				
e Excess from 2012. . . .	280,098				

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

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

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

	Tax year	Prior 3 years			(e) Total
	(a) 2012	**(b)** 2011	**(c)** 2010	**(d)** 2009	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
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 organization 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))

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

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

RONALD LINDORF
51 WEST CENTER 604
OREM,UT 84057
(801) 426-4366

b The form in which applications should be submitted and information and materials they should include

BY MAIL ONLY

c Any submission deadlines

APRIL 1

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors

PRINCIPALLY FUNDS LDS RELIGIOUS AND EDUCATION CHARITIES IN THE INTERMOUNTAIN WEST

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
See Additional Data Table				
Total . . . . ▶ **3a**				263,590
b *Approved for future payment*				
Total . . . . ▶ **3b**				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments. . . .					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities. . . .					109,592
5 Net rental income or (loss) from real estate					
a Debt-financed property.					
b Not debt-financed property.					
6 Net rental income or (loss) from personal property					
7 Other investment income.					
8 Gain or (loss) from sales of assets other than inventory					246,686
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). .					356,278

13 **Total.** Add line 12, columns (b), (d), and (e). 13 356,278

(See worksheet in line 13 instructions to verify calculations)

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

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

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)**		No
	(2) Other assets	**1a(2)**		No
b	Other transactions			
	(1) Sales of assets to a noncharitable exempt organization	**1b(1)**		No
	(2) Purchases of assets from a noncharitable exempt organization	**1b(2)**		No
	(3) Rental of facilities, equipment, or other assets	**1b(3)**		No
	(4) Reimbursement arrangements	**1b(4)**		No
	(5) Loans or loan guarantees	**1b(5)**		No
	(6) Performance of services or membership or fundraising solicitations	**1b(6)**		No
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	**1c**		No

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

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

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 or fiduciary) is based on all information of which preparer has any knowledge

******	2014-03-25	******
Signature of officer or trustee	Date	Title

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

Paid Preparer Use Only

Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☑	PTIN
STEVEN K HORTIN	STEVEN K HORTIN			

Firm's name ▶	STEVEN K HORTIN CPA PC	Firm's EIN ▶
Firm's address ▶	1521 N TECHNOLOGY WAY OREM, UT 84097	Phone no (801) 374-8740

Form 990PF Part XV Line 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*				
BRIGHAM YOUNG UNIV IDAHO 525 S CENTER ST REXBURG,ID 83460		501(c)(3)	Charitable	1,805
FOUND FOR INTEGRATED MEDICINE 20 FIFTH AVE STE 1E NEW YORK,NY 10011		501(c)(3)	Medical research	2,500
BRIGHAM YOUNG UNIVERSITY A-41 ASB PROVO,UT 84602		501(c)(3)	Educational	26,985
FOUND FOR ALTERNATIVE AND INT MED PO BOX 2860 LOVELAND,CO 80539		501(c)(3)	medical research	1,600
INSULIN DEPENDENCE INC 7770 REGENTS ROAD SAN DIEGO,CA 92122		501(c)(3)	Charitable	25,000
JUVENILE DIABETES RESEARCH 132 S 600 E 100 SALT LAKE CITY,UT 84102		501(c)(3)	Charitable	6,500
NATIONAL MS SOCIETY 6364 S HIGHLAND DR STE 101 SALT LAKE CITY,UT 84121		501(c)(3)	Charitable	500
CHURCH OF JESUS CHRIST OF LDS 47 E SO TEMPLE SALT LAKE CITY,UT 84150		501(c)(3)	Charitable	88,800
CASA FOURTH DIST COURT AD LITEM PROVO,UT 84601		501(c)(3)	Child protection	1,000
UTAH VALLEY UNIVERSITY 800 W UNIVERSITY PKWY OREM,UT 84058		501(c)(3)	Educational	1,500
ALPINE SCHOOL FOUNDATION 575 N 100 E AMERICAN FORK,UT 84003		501(c)(3)	Educational	500
BOY SCOUTS OF AMERICA 748 N 1340 W OREM,UT 84057		501(c)(3)	Charitable	200
SHS ALUMNI FOUNDATION 971 E NBANTA RD INDIANAPOLIS,IN 46227		501(c)(3)	Educational	1,500
LYME DESEASEORG PO BOX 5658 MARYSVILLE,CA 95901		501(c)(3)	medical research	45,000
UNITED WAY 148 N 100 W PROVO,UT 84604		501(c)(3)	community support	10,000

Form 990PF Part XV Line 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*				
CHARITY VISIONS INTL 1282 E CAMBRIDGE COURT PROVO, UT 84604		501(c)(3)	medical services	50,200
Total . . . . ▶ **3a**				263,590

TY 2012 Other Expenses Schedule

Name: BRUCE LINDORF MEMORIAL FOUNDATION

EIN: 23-7061702

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
investment cust fees	36,279	36,279		
medical research	10,285			10,285
Lyme testing	6,223			6,223

TY 2012 Other Increases Schedule

Name: BRUCE LINDORF MEMORIAL FOUNDATION

EIN: 23-7061702

Description	Amount
CAPITAL GAINS	246,686
ADJ TO INVESTMENTS COST BASIS	108,978

TY 2012 Taxes Schedule

Name: BRUCE LINDORF MEMORIAL FOUNDATION

EIN: 23-7061702

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Federal excise tax	5,759			
Printing	594		594	
Supplies	766		766	
Telephone	400		400	

Bruce Lindorf Memorial Foundation
Schedule 1
BLMF Schwab3148-8379
CostBasis for Single Account
Cost Basis - Realized Gain/(Loss) (Filtered by. From 12/01/2012 Through 11/30/2013)

Symbol	Name	Sold/ Closed	Acquired	Shares	Total Proceeds	Cost Basis	LT Gain/Loss
IYT	ISHARES DJ US TRANSN IDXTRAN	3/6/2013	9/30/2011	213	23,224.14	16,213 83	7,010 31
DVY	ISHARES SELECT DIVIDEND ETF	7/9/2013	12/15/2008	2250	147,793.46	89,359 71	58,433 75
IYR	ISHARES TR REAL ESTATE ETF	7/9/2013	9/29/2010	2596	173,945 98	136,966 38	36,979 60
IYW	ISHARES TRUST DOW JONES DOV	3/6/2013	9/28/2010	208	15,195.09	12,092 96	3,102 13
RWT	REDWOOD TRUST INC REIT	3/14/2013	7/18/2011	2386	55,786 65	33,952 04	21,834 61
RWT	REDWOOD TRUST INC REIT	11/18/2013	7/18/2011	1897	37,010.92	26,993 73	10,017 19
RWT	REDWOOD TRUST INC REIT	11/18/2013	8/5/2011	2127	41,498 27	26,648 34	14,849 93
JNK	SPDR BARCLAYS ETF HIGH YIELD '	5/1/2013	8/19/2010	1658	68,802.92	64,622 92	4,180 00
JNK	SPDR BARCLAYS ETF HIGH YIELD '	5/1/2013	9/6/2011	17	705 46	643 74	61 72
JNK	SPDR BARCLAYS ETF HIGH YIELD '	5/1/2013	9/6/2011	100	4,149 75	3,785 63	364.12
JNK	SPDR BARCLAYS ETF HIGH YIELD '	5/1/2013	9/6/2011	100	4,149 75	3,785 63	364 12
JNK	SPDR BARCLAYS ETF HIGH YIELD '	5/1/2013	9/6/2011	23	954 44	870 70	83 74
JNK	SPDR BARCLAYS ETF HIGH YIELD '	5/1/2013	10/5/2011	1673	69,425 39	59,189 99	10,235 40
JNK	SPDR BARCLAYS ETF HIGH YIELD '	5/1/2013	11/16/2011	1962	81,418 18	74,326 57	7,091 61
JNK	SPDR BARCLAYS ETF HIGH YIELD '	5/1/2013	3/6/2012	1742	72,288.72	68,344 82	3,943 90
					796,349 12	617,796 99	178,552 13
						178,552 13	

Bruce Lindorf Memorial Foundation
Schedule 2
BLMF Schwab 9597-6405
Cost Basis - Realized Gain/(Loss) (Filtered by From 12/01/2012 Through 11/30/2013)

Symbol	Name	Sold/ Closed	Acquired	Quantity Sold	Total Proceeds	Cost Basis	ST Gain/Loss	LT Gain/Loss
IYT	ISHARES DJ US TRANSN IDXTRA	12/31/2012	9/30/2011	441	41,475 92	33,577 03		7,898 89
EEM	ISHARES MSCI EMRG MKT FDEI	5/24/2013	12/3/2012	964	40,669 77	40,419 28	250 49	
EEM	ISHARES MSCI EMRG MKT FDEI	5/24/2013	12/31/2012	860	36,282 16	38,080 72	(1,798 56)	
EEM	ISHARES MSCI EMRG MKT FDEI	3/18/2013	12/3/2012	1825	77,211 82	76,519 89	691 93	
EWM	ISHARES MSCI MALAYSIA MAL/	8/26/2013	5/24/2013	2615	37,497 61	42,613 84	(5,116 23)	
IWS	ISHARES RUSSELL VALUE MIDC	6/26/2013	2/21/2013	672	38,656 46	36,507 08	2,149 38	
IWS	ISHARES RUSSELL VALUE MIDC	6/26/2013	3/1/2013	461	26,518 79	25,298 35	1,220 44	
IWS	ISHARES RUSSELL VALUE MIDC	6/26/2013	3/18/2013	548	31,523 42	31,094 96	428 46	
IWS	ISHARES RUSSELL VALUE MIDC	6/26/2013	4/1/2013	1514	87,092 10	85,684 39	1,407 71	
IGV	ISHARES S&P NORTH AM FD N(	2/1/2013	9/26/2012	569	38,453 05	35,757 85	2,695 20	
IYR	ISHARES TR DOW JONES RE US	6/14/2013	5/29/2013	618	42,303 53	42,852 17	(548 64)	
IYR	ISHARES TR DOW JONES RE US	12/31/2012	9/26/2012	557	35,933 73	35,741.28	192 45	
HDV	ISHARES TR HIGH DIVID EQHIG	12/3/2012	9/30/2011	89	5,332 82	4,495 92		836 90
HDV	ISHARES TR HIGH DIVID EQHIG	12/3/2012	10/17/2011	505	30,259 25	26,057 36		4,201 89
HDV	ISHARES TR HIGH DIVID EQHIG	12/3/2012	1/6/2012	88	5,272 90	4,853 26	419 64	
HDV	ISHARES TR HIGH DIVID EQHIG	12/3/2012	3/6/2012	36	2,157 09	2,035 35	121 74	
HDV	ISHARES TR HIGH DIVID EQHIG	12/3/2012	6/26/2012	893	53,507 94	51,775 53	1 732 41	
XLF	SECTOR SPDR FINCL SELECTSH/	9/30/2013	6/14/2013	2167	43,185 31	42,430 36	754 95	
XLF	SECTOR SPDR FINCL SELECTSH/	9/30/2013	6/26/2013	2983	59,447 06	57,681 38	1,765 68	
XLF	SECTOR SPDR FINCL SELECTSH/	4/1/2013	12/31/2012	2100	37,939 30	34,298 17	3,641 13	
XLV	SECTOR SPDR HEALTH FUND SI	3/1/2013	6/4/2012	918	40,070 03	32,614 47	7,455 56	
XLB	SECTOR SPDR MATERIALS FDSH	4/1/2013	3/1/2013	943	36,568 63	36,297 19	271 44	
XLP	SECTOR SPDR TR CON STPLSSH	12/31/2012	5/16/2012	416	14,434 26	14,142 30	291 96	
XLP	SECTOR SPDR TR CON STPLSSH	12/31/2012	5/24/2012	571	19,812 42	19,318 00	494 42	
XHB	SPDR S&P HOMEBUILDERS ETF	2/11/2013	12/31/2012	552	15,652 32	14,651 58	1,000 74	
XES	SPDR S&P OIL & GAS EQUIPSER	3/1/2013	6/26/2012	1170	45,074 24	33,013 60	12,060 64	
XOP	SPDR S&P OIL & GAS EXPL PRO	11/25/2013	3/1/2013	283	19,387 81	16,376 33	3,011 48	
XPH	SPDR S&P PHARMACEUTICALS	2/11/2013	9/26/2012	698	42,525 79	41,542 11	983 68	
XPH	SPDR S&P PHARMACEUTICALS	2/11/2013	11/28/2012	523	31,863 88	29,049 62	2,814 26	
KRE	SPDR S&P REGIONAL BKING	3/1/2013	2/4/2013	1210	36,730 19	36,228 00	502 19	
XRT	SPDR S&P RETAIL ETF	11/1/2013	12/31/2012	736	62,054 27	45,752 31	16,301 96	
					1,134,893 87	1,066,759 68	55,196 51	12,937 68