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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 BOECKMANN CHARITABLE FOUNDATION		A Employer identification number 95-3806976	
Number and street (or P O box number if mail is not delivered to street address) 15505 ROSCOE BLVD		B Telephone number (see instructions) (818) 787-3800	
City or town, state, and ZIP code NORTH HILLS, CA 91343		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ 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) \$ 626,539		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	
J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) (Part I, column (d) must be on cash basis.)			

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)	326,505			
	2 Check ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	17	17	17	
	4 Dividends and interest from securities.	10,642	10,642	10,642	
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	331,384			
	b Gross sales price for all assets on line 6a _____ 600,413				
	7 Capital gain net income (from Part IV, line 2)		331,384		
	8 Net short-term capital gain			24	
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	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	668,548	342,043	10,683	
	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	2,500			
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	3,829			
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	939			
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	7,268	0		0
	25 Contributions, gifts, grants paid	574,561			574,561
	26 Total expenses and disbursements. Add lines 24 and 25	581,829	0		574,561
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	86,719			
	b Net investment income (if negative, enter -0-)		342,043		
	c Adjusted net income (if negative, enter -0-)			10,683	

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	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	160,124	189,367	189,367
	2	Savings and temporary cash investments			
	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)	74,235	131,711	341,679
	c	Investments—corporate bonds (attach schedule).			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	95,493	95,493	95,493
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
Liabilities	15	Other assets (describe ▶ _____)			
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	329,852	416,571	626,539
	17	Accounts payable and accrued expenses			
	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)		0	
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			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	329,852	416,571	
	30	Total net assets or fund balances (see page 17 of the instructions)	329,852	416,571	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	329,852	416,571	

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	329,852
2	Enter amount from Part I, line 27a	2	86,719
3	Other increases not included in line 2 (itemize) ▶ _____	3	
4	Add lines 1, 2, and 3	4	416,571
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	416,571

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a	See Additional Data Table			
b				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a See Additional Data Table			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(I) 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 See Additional Data Table			
b			
c			
d			
e			

2	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	331,384
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	24

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	698,500	486,348	1 43621
2010	302,530	416,975	0 72554
2009	248,048	251,189	0 98750
2008	154,678	213,024	0 72611
2007	492,045	543,240	0 90576

2	Total of line 1, column (d).	2	4 78111
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 95622
4	Enter the net value of noncharitable-use assets for 2012 from Part X, line 5.	4	752,507
5	Multiply line 4 by line 3.	5	719,564
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	3,420
7	Add lines 5 and 6.	7	722,984
8	Enter qualifying distributions from Part XII, line 4. If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions	8	574,561

Part VIExcise 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	6,841
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	
3		Add lines 1 and 2.		3	6,841
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	6,841
6		Credits/Payments			
a		2012 estimated tax payments and 2011 overpayment credited to 2012	6a		
b		Exempt foreign organizations—tax withheld at source	6b		
c		Tax paid with application for extension of time to file (Form 8868)	6c		
d		Backup withholding erroneously withheld	6d		
7		Total credits and payments Add lines 6a through 6d.		7	
8		Enter any penalty for underpayment of estimated tax Check here ☒ if Form 2220 is attached		8	80
9		Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	6,921
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-AStatements Regarding Activities

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?		Yes	No
		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)?			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?	2		No
	If "Yes," attach a detailed description of the activities.			
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		No
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?	5		No
	If "Yes," attach the statement required by General Instruction T.			
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	Yes	

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 HERBERT F BOECKMANN Telephone no (818) 787-3800 Located at 15505 ROSCOE BLVD NORTH HILLS CA ZIP +4 91343			
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)? Organizations relying on a current notice regarding disaster assistance check here.	1b		No
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? 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		No
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?			
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		No
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		No
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?				
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?				
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?				
b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?		7b		No

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
JANE F BOECKMANN	CFO	0		
15505 ROSCOE BLVD	1 00			
NORTH HILLS, CA 91343				
HERBERT BOECKMANN II	President	0		
15505 ROSCOE BLVD	1 00			
NORTH HILLS, CA 91343				
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.				

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.		

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	458,559
b	Average of monthly cash balances.	1b	209,914
c	Fair market value of all other assets (see instructions).	1c	95,493
d	Total (add lines 1a, b, and c).	1d	763,966
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	
3	Subtract line 2 from line 1d.	3	763,966
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	11,459
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	752,507
6	Minimum investment return. Enter 5% of line 5.	6	37,625

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	37,625
2a	Tax on investment income for 2012 from Part VI, line 5.	2a	6,841
b	Income tax for 2012 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	6,841
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	30,784
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	30,784
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	30,784

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	574,561
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	574,561
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions).	5	
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	574,561
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				30,784
2 Undistributed income, if any, as of the end of 2012				
a Enter amount for 2011 only.				
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2012				
a From 2007.				464,985
b From 2008.				144,091
c From 2009.				239,479
d From 2010.				1,921,746
e From 2011.				698,471
f Total of lines 3a through e.	3,468,772			
4 Qualifying distributions for 2012 from Part XII, line 4 ▶ \$ 574,561				
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).	0			
d Applied to 2012 distributable amount.				30,784
e Remaining amount distributed out of corpus	543,777			
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	4,012,549			
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				
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). . .	464,985			
9 Excess distributions carryover to 2013. Subtract lines 7 and 8 from line 6a.	3,547,564			
10 Analysis of line 9				
a Excess from 2008. . . .				144,091
b Excess from 2009. . . .				239,479
c Excess from 2010. . . .				1,921,746
d Excess from 2011. . . .				698,471
e Excess from 2012. . . .				543,777

Part XIVPrivate 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)

☐ 4942(j)(3) or ☐ 4942(j)(5)

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

See Additional Data Table

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

HERBERT JANE BOECKMANN II
15505 ROSCOE BLVD
NORTH HILLS,CA 91343
(818) 787-3800

b

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

BY LETTER OR INDIRECT CONTACT

c

Any submission deadlines

NONE

d

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

NONE

Form 990-PF (2012)

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

Form **990-PF** (2012)

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					17
4	Dividends and interest from securities. . . .					10,642
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					331,384
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). .					342,043
13	Total. Add line 12, columns (b), (d), and (e).					342,043

[illegible]

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

Form **990-PF** (2012)

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
1,625 EXTERRAN HOLDING INC SHARES	D	2002-10-08	2013-05-16
10,000 FORD SHARES	D	2008-01-03	2013-05-16
20,000 FORD SHARES	D	2008-01-03	2013-03-26
2,500 TESORO SHARES	D	2010-04-16	2012-12-20
2,152 FORD SHARES	D	2008-10-09	2012-12-20
348 FORD SHARES	P	2012-06-01	2012-12-20

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
47,153		32,046	15,107
147,592		65,301	82,291
266,199		130,602	135,597
110,495		32,400	78,095
24,942		4,672	20,270
4,032		4,008	24

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			15,107
			82,291
			135,597
			78,095
			20,270
			24

Form 990PF Part XV Line 1a - 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).

JANE F BOECKMANN
HERBERT BOECKMANN II

TY 2012 Accounting Fees Schedule**Name:** BOECKMANN CHARITABLE FOUNDATION**EIN:** 95-3806976**Software ID:** 12000229**Software Version:** 2012v2.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	2,500	0	0	0

TY 2012 General Explanation Attachment

Name: BOECKMANN CHARITABLE FOUNDATION

EIN: 95-3806976

Software ID: 12000229

Software Version: 2012v2.0

Identifier	Return Reference	Explanation
		BOECKMANN CHARITABLE FOUNDATIONFEIN 95-3806976SCHEDULE OF CONTRIBUTIONS, GIFTS, GRANTS PAIDNOVEMBER 30, 2013PEPPERDINE UNIVERSITY6100 CENTER DRIVE STE 300LOS ANGELES, CA 90045 3,000 SEND MINISTRIES2027 KALLIN AVENUELONG BEACH, CA 90815 500 HARKHAM HILLEL HEBREW ACADEMY9120 W OLYMPIC BLVD BEVERLY HILLS, CA 90212 1,000 MINISTERIO LOGOS901 E SOUTH STREETLONG BEACH, CA 90805 1,000 MIKE BARBER MINISTRIESPO BOX 1086DESOTO, TX 75123-1086 10,000 MALKOSH MINISTRIESPO BOX 417N HOLLYWOOD, CA 91603 5,000 KING'S UNIVERSITY 14800 SHERMAN WAYVAN NUYS, CA 91405 100,000 HILLSDALE COLLEGE33 E COLLEGE STHILLSDALE, MI 49242 25,000 SOCIETY DEVOTED TO SACRED HEART10480 1/2 WINNETKA AVENUECHATSWORTH, CA 91311 10,000 GLOBAL ADOPT A PEOPLE CAMPAIGN1443 E WASHINGTON BLVD PASADENA, CA 91104 10,000 HOLY TRINITY LUTHERAN CHURCH1 W AVENUE DE LOS ARBOLESTHOUSAND OAKS, CA 91360 1,000 CENTRO ESPERANZA510 SAN GABRIEL AVENUEAZUSA, CA 91702 1,500 GREGG BANTLEY MEMORIAL SCHOLARSHIP FUND C/O KING UNIVERSITY 14800 SHERMAN WAYVAN NUYS, CA 91405 500 VICTORIOUS LIVING CHRISTIAN CENTER3427-A POMONA BLVD POMONA, CA 91768 1,000 EAST WEST COMMUNITY CHURCH SAN FERNANDO VALLEY7060 AMIGO AVENUE RESEDA, CA 91335 1,000 BASEBALLERS AGAINST DRUGS5389 MOHAVE DR SIMI VALLEY, CA 93063 2,500 ABUNDANT GRACE BY DIVINE GUIDANCE MINISTRIES2633 N FAIROAKS AVE ALTA DENA, CA 91001 1,000 PARALYZED VETERANS OF AMERICAPO BOX 758532 TOPEKA, KS 66675-8532 500 SHEPHERD'S STAFF MISSION FACILITATORSPO BOX 53640 ALBUQUERQUE, NM 87153-3640 1,000 ON TARGET MINISTRIESPO BOX 1654 MONUMENT, CO 80132-1654 1,000 COLLEGE OF THE CANYONS FOUNDATION26455 ROCKWELL CANYON ROAD SANTA CLARITA, CA 91355 2,000 NEW HORIZONS15725 PARTHENIA STREET NORTH HILLS, CA 91343 5,000 PARTNERS IN CARE FOUNDATION732 MOTT STREET STE 150 SAN FERNANDO, CA 91340 5,000 SPIRIT OF ZION FELLOWSHIP CHURCHPO BOX 8244 MISSION HILLS, CA 91346 1,000 NEW LIFE CHURCH IN THE VALLEY 15950 CHATSWORTH STREET GRANADA HILLS, CA 91344 1,000 SEND MINISTRIES2027 KALLIN AVENUELONG BEACH, CA 90815 1,000 KING'S UNIVERSITY 14800 SHERMAN WAYVAN NUYS, CA 91405 25,000 HORATIO ALGER ASSN99 CANAL CENTER PLAZA ALEXANDRIA, VA 22314 50,000 STREETWISE MINISTRIESPO BOX 869 HOLLYWOOD, CA 90078 1,000 SHEPHERD OF THE HILLS CHURCH19700 RINALDI STREET PORTER RANCH, CA 91326 1,000 PASADENA CHRISTIAN SCHOOL1515 N LOS ROBLES PASADENA, CA 91104 1,000 CALIFORNIA LUTHERAN UNIVERSITY60 W OLSEN ROAD THOUSAND OAKS, CA 91360 1,000 BEL AIR PRESBYTERIAN CHURCH16221 MULHOLLAND DRIVE LOS ANGELES, CA 90049 2,000 PENTECOSTAL ASSEMBLY OF GOD214 N MACLAY SAN FERNANDO, CA 91340 1,000 FGBMFI INTERNATIONAL18101 VON KARMAN 3RD FLOOR IRVINE, CA 92612 10,000 VICTORY TABERNACLE1614 W VICTORY BLVD BURBANK, CA 91506 1,000 TEEN LINEPO BOX 48750 LOS ANGELES, CA 90048-0750 1,500 CHOC LOS ANGELES4650 SUNSET BLVD LOS ANGELES, CA 90027 2,000 THE OASIS OF HOLLYWOOD1725 IVAR AVENUE LOS ANGELES, CA 90028 1,000 IGNITE MINISTRIES614 S 5TH AVENUE LA PUENTE, CA 91746 1,000 HERITAGE CHRISTIAN SCHOOL17531 RINALDI STREET GRANADA HILLS, CA 91344 1,000 FURRY ANGEL FOUNDATION72-877 DINAH SHORE DRIVE, STE 103 RANCHO MIRAGE, CA 92270 1,000 ROMAN CATHOLIC ARCHBISHOP OF L A 15444 NORDHOFF STREET NORTH HILLS, CA 91343 1,000 ROMAN CATHOLIC ARCHBISHOP OF L A 15444 NORDHOFF STREET NORTH HILLS, CA 91343 1,000 FIRST FOURSQUARE CHURCH OF VAN NUYS14300 SHERMAN WAYVAN NUYS, CA 91405 55,000 KING'S UNIVERSITY 14800 SHERMAN WAYVAN NUYS, CA 91405 35,000 PEPPERDINE UNIVERSITY6100 CENTER DRIVE STE 300 LOS ANGELES, CA 90045 3,000 GATES OF GLORY CHURCHPO BOX 4679 DALLAS, TX 75234 2,000 TOTAL INVOLVEMENT MINISTRY8516 LANGDON AVENUE NORTH HILLS, CA 91343-5817 2,000 ALZHEIMER'S ASSNPO BOX 96011 WASHINGTON D C 20090-6011 500 THE AUGUSTINIAN FUND214 ASHWOOD ROAD VILLANOVA, PA 19085-0340 10,000 KING'S UNIVERSITY 14800 SHERMAN WAYVAN NUYS, CA 91405 50,000 LAPD PLAS DEVONSHIRE DIVISION8721 WILBUR AVENUE NORTH RIDGE, CA 91324 1,000 GRACE COMMUNITY CHURCH13428 ROSCOE BLVD SUN VALLEY, CA 91352 1,000 BEL AIR PRESBYTERIAN CHURCH16221 MULHOLLAND DRIVE LOS ANGELES, CA 90049 1,000 REEL COWBOY SPO BOX 57203 SHERMAN OAKS, CA 91403 10,000 GRACE COMMUNITY CHURCH13428 ROSCOE BLVD SUN VALLEY, CA 91352 1,000 MARY IMMACULATE CHURCH10390 REMICK AVENUE PACOIMA, CA 91331 1,000 HCMA337 E CHAPMAN AVENUE PLACENTIA, CA 92870 1,000 WORLD VISION INTL800 W CHESTNUT AVENUE MONROVIA, CA 91016 1,000 NORTH PARK COMMUNITY CHURCH28310 KELLY JOHNSON PARKWAY SANTA CLARITA, CA 91355 1,000 SFV COMMUNITY MENTAL HEALTH6842 VAN NUYS BLVD 6TH FLOOR VAN NUYS, CA 91405 1,000 LA WORLD AFFAIRS COUNCIL3535 HAYDEN AVENUE STE 200 CULVER CITY, CA 90232 3,500 IGLESIA DE JESUS CRISTO1203 E 7TH STREET LONG BEACH, CA 90813 1,000 MIKE BARBER MINISTRIESPO BOX 1086 DESOTO, TX 75123-1086 25,000 VICTORIOUS LIVING CHRISTIAN CENTER3427 A POMONA BLVD POMONA, CA 91768 1,000 MISSION BRIDGE11300 KAMLOOPS STREET SYLMAR, CA 91342 700 MALKOSH MINISTRIESPO BOX 417N HOLLYWOOD, CA 91603 5,000 NEW HEIGHTS CHRISTIAN CHURCH319 DEACON ROAD FREDERICKSBURG, VA 22405 1,000 THE SHEPHERDS HOUSE95 N OAK VIEW DRIVE THOUSAND OAKS, CA 91362 1,000 LIFE CHRISTIAN FELLOWSHIP1901 N CITRUS EDGE CIRCLE ANAHEIM, CA 92807 1,000 THOUSAND OAKS FOURSQUARE CHURCH95 N OAKS VIEW DRIVE THOUSAND OAKS, CA 91362 1,000 WORLD IMPACT2001 S VERMONT AVENUE LOS ANGELES, CA 90007 2,000 THE KOREAN CHURCH OF L A 8756 WOODLEY AVENUE NORTH HILLS, CA 91326 1,000 CHRIST FOR ALL NATIONSPO BOX 590588 ORLANDO, FL 32859 5,000 RESTORATION LIFE CHRISTIAN CHURCH4234 W, 147TH STREET LAWNDALE, CA 90260 1,000 JESUS IS SUPREME26505 TAHOE DRIVE VALENCIA, CA 91354 1,000 ST CLARE CATHOLIC CHURCH27341 CAMP PLENTY ROAD CANYON COUNTRY, CA 91351 1,000 CHRIST THE REDEEMER BAPTIST CHURCH12745 ORIOLE AVE GRAND TERRACE, CA 92313 1,000 WALLA WALLA UNIVERSITY204 S COLLEGE AVE COLLEGE PLACE, WA 99324 500 CROSSROADS CHRISTIAN FELLOWSHIP2107 E VILLA STREET PASADENA, CA 91107 1,000 THE ADULT SKILLS CENTER17400 VAN OWEN STREET VAN NUYS, CA 91406 1,000 THE BRIDGE BIBLE FELLOWSHIP18644 SHERMAN WAY RESEDA, CA 91335 1,000 THE RIVER COMMUNITY CHURCH889 E SANTA CLARA STREET VENTURA, CA 93001 1,000 VENTURA COUNTY PREGNANCY CENTER1304 E MAIN STREET STE A VENTURA, CA 93001 1,000 IGLESIA BAUTISTA7880 W CRAIG ROAD LAS VEGAS, NV 89129 1,000 ST MARY'S CHURCH407 S CHICAGO ST LOS ANGELES, CA 90033 1,500 MALKOSH MINISTRIESPO BOX 417N HOLLYWOOD, CA 91603 2,000 HORATIO ALGER ASSN99 CANAL CENTER PLAZA ALEXANDRIA, VA 22314 10,000 PROSPERITY THROUGH LEADERSHIP800 S BROADWAY # 301 WALNUT CREEK, CA 94596 1,000 LIFE IN CHRIST BIBLE CHURCH154 W SIERRA MADRE SIERRA MADRE, CA 91024 1,000 A+ ADVENTIST CHILDREN CENTER234 N ISABEL STREET GLENDALE, CA 91206 1,000 THE BRIDGE18644 SHERMAN WAY RESEDA, CA 91335 1,000 YOUTHLINK OF AMERICA5500 HOLLYWOOD BLVD HOLLYWOOD, CA 90028 1,000 GUARDIAN ANGEL CATHOLIC CHURCH10919 NORRIS AVENUE PACOIMA, CA 91331 2,000 ST VINCENT MEALS ON WHEELS2131 W 3RD STREET LOS ANGELES, CA 90057 1,000 OUR LADY MT LEBANON CHURCH333 ST VICENTE LOS ANGELES, CA 90048 2,000 FAMILY LIFE FELLOWSHIP339 N WILLIAMS STREET MOBERLY, MO 65270 1,000 OUR LADY MT LEBANON CHURCH333 ST VICENTE LOS ANGELES, CA 90048 1,000 IRAN FOR CHRIST MINISTRIESPO BOX 371043 RESEDA, CA 91337 1,000 MISSION BRIDGE11300 KAMLOOPS STREET SYLMAR, CA 91342 1,000 IGLESIA DE DIOS EN CRISTO CENTRAL9641 VIRGINIA AVE SOUTH GATE, CA 90280 10,000 TEMPLE BETH AMI23023 HILSE LNSANTA CLARITA, CA 91321 1,000 CANINES AND MORE BEING RESCUED IN AMERICA4422 HUBBARD ROAD ACTON, CA 93510 1,000 SHEPHERD OF THE HILLS19700 RINALDI STREET LOS ANGELES, CA 91326 1,000 SAFFYRE SANCTUARY INCPO BOX 921708 SYLMAR, CA 91392-1708 1,000 LAPD MUSEUM6045 YORK BLVD LOS ANGELES, CA 90042 2,861 MENDPO BOX 631566 IRVING, TX 75063 1,000 TOTAL 574,561 PURPOSE OF THE ABOVE CONTRIBUTIONS TO ASSIST NON-PROFIT ORGANIZATIONS IN THEIR CHARITABLE ENDEAVORS

TY 2012 Other Expenses Schedule**Name:** BOECKMANN CHARITABLE FOUNDATION**EIN:** 95-3806976**Software ID:** 12000229**Software Version:** 2012v2.0

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
CONSULTING FEES	939			

TY 2012 Substantial Contributors Schedule

Name: BOECKMANN CHARITABLE FOUNDATION

EIN: 95-3806976

Software ID: 12000229

Software Version: 2012v2.0

Name	Address
HERBERT JANE BOECKMANN	15505 ROSCOE BLVD NORTH HILLS,CA 91343

TY 2012 Taxes Schedule

Name: BOECKMANN CHARITABLE FOUNDATION

EIN: 95-3806976

Software ID: 12000229

Software Version: 2012v2.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX & LICENSES	3,829			