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Form **.990-PF**

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

2013

OMB No 1545-0052

Department of the Treasury Internal Revenue Service

► Do not enter Social Security numbers on this form as it may be made public. ► Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf.

For cal	endar year 2013, or tax year beginning		, and ending	,	
	S FAMILY FOUNDATION 5 NORTH 90TH PLACE		-	A Employer identification number 20-3794532 B Telephone number (see the instructions)	
	TSDALE, AZ 85255			B Telephone number (see the instructions)	
G Che	eck all that apply Initial return	Initial return of a form	ner public charity	C If exemption application is pending, check here	
	Final return Address change	Amended return Name change		D 1 Foreign organizations, check here	
H Ç	theck type of organization X Section 50	1(c)(3) exempt private f		2 Foreign organizations meeting the 85% test, che here and attach computation	eck
	Section 4947(a)(1) nonexempt charitable	<u>. </u>	private foundation	E If private foundation status was terminated under section 507(b)(1)(A), check here	►□
	from Part II, column (c), line 16)	counting method XC Other (specify) column (d) must be or		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here	□
Part		(a) Revenue and	(b) Net investmen	d (c) Advistad via d (d) Dishusaasa	
	Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))	expenses per books	income	nt (c) Adjusted net (d) Disbursem for charita purposes (basis only	able cash
	1 Contributions, gifts, grants, etc, received (att sch)	300,000.	*		4
	2 Ck Inf the foundn is not req to att Sch B 3 Interest on savings and temporary	, 12 👈 (br)	11 10 10 11		4
	cash investments 4 Dividends and interest from securities	16 272	16 27	16 272	
er-th-	5 a Gross rents	16,373.	16,37	16,373.	<u> </u>
2014 2	b Net rental income or (loss) 6 a Net gain/(loss) from sale of assets not on line 10	* ***			<i>*</i>
k Ε Ε Θ Ε	b Gross sales price for all assets not on line to assets not on line for assets on line 6a.	5. M. 12	in the contract of the contrac		42.
Ě	7 Capital gain net income (from Part IV, line 2) 8 Net short-term capital gain				// A
MAY	9 Income modifications		* * *		<u> </u>
_	10 a Gross sales less returns and allowances		* 0 · 1 1	4 4 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	15.
Ĭ	b Less Cost of goods sold		* : * * *		
	c Gross profit/(loss) (att sch) 11 Other income (attach schedule)			4 " 'n h 1 5	
	, ,			0,, 00%	
	12 Total. Add lines 1 through 1113 Compensation of officers, directors, trustees, etc.	316,373. 0.	16,37	3. 16,373.	i 4
	14 Other employee salaries and wages	0.			
	15 Pension plans, employee benefits 16a Legal fees (attach schedule)				
A D M	b Accounting fees (attach sch) SEE ST 1	820 			
I N	c Other prof fees (attach sch)			7	
O i P S E T	17 Interest 18 Taxes (attach schedule Ysee instrs)		The same of the sa		
R R A A T T	19 Depreciation (attach sch) and depletion		APR 2 1 203/		
N V	20 Occupancy		·		
GÉ	21 Travel, conferences, and meetings 22 Printing and publications	- 1	11	<u>ii</u>	
A E N X D P	23 Other expenses (attach schedule)	<u></u>		- - - - - - - - - - 	
E N S	SEE STATEMENT 2 24 Total operating and administrative	160.			
Š	expenses. Add lines 13 through 23 25 Contributions, gifts, grants paid PART XV	980.			
	26 Total expenses and disbursements.	181,000.		181,	000.
	Add lines 24 and 25 27 Subtract line 26 from line 12:	181,980.		0. 0. 181,	000.
	a Excess of revenue over expenses and disbursements	124 202			
	b Net investment income (if negative, enter 0-)	134,393.	16,37	3.	
DAA 5	C Adjusted net income (if negative, enter -0-)			16,373.	
BAA F	or Paperwork Reduction Act Notice, see ins	tructions.		TEEA0504L 10/18/13 Form 990-PF	(2013)

Form	Form 990-PF (2013) HELMS FAMILY FOUNDATION 20-379453				
Par	t II	Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year		of year
		(See instructions)	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash — non-interest-bearing Savings and temporary cash investments	006 600		
	3	Accounts receivable	926,689.	1,064,082.	
	3	Less. allowance for doubtful accounts			
	4	Pledges receivable			
	7	Less allowance for doubtful accounts			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other			-
	•	disqualified persons (attach schedule) (see instructions)			Ì
_	7	Other notes and loans receivable (attach sch)			
A S S E T S	1	Less. allowance for doubtful accounts ▶			
Š	8	Inventories for sale or use			
T	9	Prepaid expenses and deferred charges			
Ś	10:	a Investments – US and state government obligations (attach schedule)			
	1	b Investments — corporate stock (attach schedule)			
		c Investments — corporate bonds (attach schedule)		<u> </u>	
	11	Investments – land, buildings, and equipment basis. ►	** ', * *	**, ** * *	// A & By
		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)			
	I	Other assets (describe >)	3,000.		
	16	Total assets (to be completed by all filers – see the instructions Also, see page 1, item I)	020, 600	1 064 000	
L	17		929,689.	1,064,082.	0.
I A	18	Grants payable			
B	19	Deferred revenue	-		
1	20	Loans from officers, directors, trustees, & other disqualified persons			
Ī	21	Mortgages and other notes payable (attach schedule)			
Ţ	22	Other liabilities (describe ►)			* *
Ē	23	Total liabilities (add lines 17 through 22)			3 × 6.
<u>_S</u> _	23	Foundations that follow SFAS 117, check here	0.	0.	
		and complete lines 24 through 26 and lines 30 and 31.			* /
N F	24	Unrestricted			√\$y & √1
E U	25	Temporarily restricted			
ח	26	· · · · · · · · · · · · · · · · · · ·			Î
A B S A E L		Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.			*
ĔĹ	27	Capital stock, trust principal, or current funds			. ^
T A S N	28	Paid-in or capital surplus, or land, building, and equipment fund	_		*
C	29	Retained earnings, accumulated income, endowment, or other funds	929,689.	1,064,082.	
RS	30	Total net assets or fund balances (see instructions)	929,689.	1,064,082.	*
	31	Total liabilities and net assets/fund balances (see instructions)			
Parl		Analysis of Changes in Net Assets or Fund Balance	929,689.	1,064,082.	
			-		
1	end-	net assets or fund balances at beginning of year – Part II, colur of-year figure reported on prior year's return)	mn (a), line 30 (must ag	ree with	920 600
		r amount from Part I, line 27a		2	929,689. 134,393.
		increases not included in line 2 (itemize).		3	134,333.
		lines 1, 2, and 3			1,064,082.
	_			<u>`</u>	

5 Decreases not included in line 2 (itemize).

5

6

' (a) List and describe	the kind(s) of property sold (e g , rie; or common stock, 200 shares ML	eal estate,	(b) How acqu P — Purcha D — Donati	ase ((C) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1a 97000 CD SALLIE MAE	BANK		P		1/29/09	2/06/13
b 95000 CD CITI BANK			P		3/13/09	3/18/13
С					_ <u>-</u>	
d	<u></u>					
e	· 	<u> </u>				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other bas plus expense of sal	e e		(h) Gain or (e) plus (f) m	
a 97,000.			7,000.			0.
b 95,000.		9	5,000.			0.
c						
d						
e		11 (10/01/01	 _			
(i) Fair Market Value	ng gain in column (h) and owned b			021	(I) Gains (Coli n minus column (k	umn (h)
as of 12/31/69	as of 12/31/69	(k) Excess of column over column (j), if a	ny		1 -0-) or Losses (fr	
a						0.
b				_		0.
c						
d				_		
e						
2 Capital gain net income or (net3 Net short-term capital gain or (i		enter in Part I, line 7 ter -0- in Part I, line 7		2		0.
, ,		· · ·	}			
If gain, also enter in Part I, line in Part I, line	8, column (c) (see instructions) If	(loss), enter -0-	.	3		0.
·	Section 4940(e) for Reduce	d Tax on Net Investme	ent Incon	- 1		
If section 4940(d)(2) applies, leave the Was the foundation liable for the section 'Yes,' the foundation does not qualify.	tion 4942 tax on the distributable ar	omplete this part.			Yes	☐ No
_ (a)	(b)		g any entre		(d)	
Base period years Calendar year (or tax year beginning in)	Adjusted qualifying distributions	(c) Net value of noncharitable-use ass	sets	(colur	Distribution	ratio by column (c))
2012						
2011					-	 -
2010						
2009						
2008						
2 Total of line 1, column (d)				2		
3 Average distribution ratio for th number of years the foundation	e 5-year base period — divide the to has been in existence if less than	otal on line 2 by 5, or by the 5 vears		3		
•		•	-			
4 Enter the net value of nonchari	table-use assets for 2013 from Part	. A, III le 5		4		
5 Multiply line 4 by line 3				5	_ _	
6 Enter 1% of net investment inc	ome (1% of Part I, line 27b)		-	6	 	
7 Add lines 5 and 6			-	7		
8 Enter qualifying distributions from	om Part XII, line 4			8		-
If line 8 is equal to or greater the Part VI instructions	nan line 7, check the box in Part VI	line 1b, and complete that	part using	a 1%	tax rate. See t	he

		<u>-3794:</u>				² age 4
Par	VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - se	e instru	ction	s)		
1 a	Exempt operating foundations described in section 4940(d)(2), check here					
	Date of ruling or determination letter (attach copy of letter if necessary – see instrs)	1 1				
b	Domestic foundations that meet the section 4940(e) requirements in Part V,	1			3	327.
	check here ► and enter 1% of Part I, line 27b					
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, column (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				<u>327.</u>
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4				0.
5	Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-	5			3	327.
6	Credits/Payments					
а	2013 estimated tax pmts and 2012 overpayment credited to 2013	_				
b	Exempt foreign organizations — tax withheld at source 6b]				
C	Tax paid with application for extension of time to file (Form 8868)]				<i>i</i> >.
d	Backup withholding erroneously withheld 6 d					* / ·
7	Total credits and payments Add lines 6a through 6d	7				0.
8	Enter any penalty for underpayment of estimated tax. Check here	8				
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9			3	327.
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 2014 estimated tax	11				
Par	VII-A Statements Regarding Activities					
1 a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it				Yes	No
	participate or intervene in any political campaign?			1 a		X
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)?			1 b		х
	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?			1 c		X
	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year		t		-	, " % a. c
	(1) On the foundation • \$ 0. (2) On foundation managers • \$		0.	تب		
е	e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ►\$: 3
2	toundation managers 5 0. Has the foundation engaged in any activities that have not previously been reported to the IRS?					
2						
	If 'Yes,' attach a detailed description of the activities					
3	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					
4 -	Did the foundation have unrelated business gross income of \$1,000 or more during the year?		}	3 4 a		X
	If 'Yes,' has it filed a tax return on Form 990-T for this year?		}	4 a		X
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?		}	5	N	/A
,	If 'Yes,' attach the statement required by General Instruction T		}	-		X
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either			1		
•	By language in the governing instrument, or				j	
			}			
	 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? 		ŀ	6		Х
7	Did the foundation have at least \$5,000 in assets at any time during the year? If 'Yes,' complete Part II, column (c), and Part XV		}	7	Х	
	Enter the states to which the foundation reports or with which it is registered (see instructions)		ŀ		_^_	<u> </u>
	AZ		_			
t	off 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 <i>General Instruction G² If 'No,' attach explanation</i>		ł	8 b	X	
_			}	30	_^	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) of for calendar year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? If 'Yes,' complete the complete in the section of the taxable year beginning in 2013 (see instructions for Part XIV)?	ir 4942(j ite Part	1)(5)	9		X
		io i ait	~			_^_
10	Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names and addresses			10		Х
BAA			For)-PF (2	
					·-	.,

Pai	rt VII-A Statements Regarding Activities (continued)					
	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes', attach schedule (see instructions)			11		х
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified persadvisory privileges? If 'Yes,' attach statement (see instructions)	on had		12		Х
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption Website address	n applica	tion?	13	Х	
14	Website address The books are in care of ► Located at ► Telephon ZIP + 4 ►			-	 	- - -
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — Check here			_N/A		
16	and enter the amount of tax-exempt interest received or accrued during the year At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority		15		Yes	N/A No
	bank, securities, or other financial account in a foreign country?			16		Х
Dai	See the instructions for exceptions and filing requirements for Form TD F 90-22 1 If 'Yes,' enter the name of the foreign country TVII-B Statements Regarding Activities for Which Form 4720 May Be Required	ne 		,		
rai						
	File Form 4720 if any item is checked in the 'Yes' column, unless an exception applies.			Ll	Yes	No
1 a	a 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	XNo			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	Yes	XNo			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	Yes	X No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	Yes	XNo			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	Yes	XNo			* * *
	(6) Agree to pay money or property to a government official? (Exception. Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)	Yes	X No	,		
t	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)	7		1 b	N	/ <u>A</u>
	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 2013?			1 c		
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))					**
â	a At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013?	Yes	XNo			,
	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 (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942) all years listed, answer 'No' and attach statement — see instructions \(\)	(a)(2) a)(2) to				
c	c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years l	nere		2 b	N	/A
	► 20 , 20 , 20 , 20				1	
3 a	a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	Yes	X No			
k	b If 'Yes,' did it have excess business holdings in 2013 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approve by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or	d	_			
	(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 2013)			3 b	N	' 'A
4 a	a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?			4 a		х
ŀ	b Did the foundation make any investment in a prior year (but after December 31, 1969) that could				T	
	jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?			4 b		
BAA			For	m 99 0	-PF (2	
			1 01	220	• • • • • •	

Form 990-PF (2013) HELMS FAMILY FOUND	DATION			3794532	2 Page 6
Part VII-B Statements Regarding Activiti		1 4720 May Be Req	uired (continue	<u>d)</u>	
5 a During the year did the foundation pay or incu	•				
(1) Carry on propaganda, or otherwise attempt	it to influence legislatio	n (section 4945(e))?	∐ Yes	X No	
(2) Influence the outcome of any specific pub on, directly or indirectly, any voter registra		1 4955), or to carry	Yes	X No	
(3) Provide a grant to an individual for travel,	-		Yes	X No	
(4) Provide a grant to an organization other the in section 509(a)(1), (2), or (3), or section			Yes	X No	
(5) Provide for any purpose other than religior educational purposes, or for the prevention	us, charitable, scientific n of cruelty to children	c, literary, or or animals?	Yes	X No	
b If any answer is 'Yes' to 5a(1)-(5), did any of described in Regulations section 53 4945 or in (see instructions)?	a current notice regard	ding disaster assistance	tions		5b N/A
Organizations relying on a current notice rega	J		_		
c If the answer is 'Yes' to question 5a(4), does to tax because it maintained expenditure response	·		N/A Yes	No	*
If 'Yes,' attach the statement required by Regi	ulations section 53 4945	5-5(d)			
6 a Did the foundation, during the year, receive ar on a personal benefit contract?	ny funds, directly or ind	rectly, to pay premium:	Yes	X No	
b Did the foundation, during the year, pay premi	ums, directly or indirec	tly, on a personal bene	fit contract 7	_ [6 b X
If 'Yes' to 6b, file Form 8870				_ [*
7 a At any time during the tax year, was the found			·	X No	
b If 'Yes,' did the foundation receive any procee				N/A	7 b
Part VIII Information About Officers, Diand Contractors	irectors, Trustees,	Foundation Manag	gers, Highly Pai	d Emplo	yees,
					
1 List all officers, directors, trustees, foundation					
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions employee bene plans and deferr compensation	efit ot	xpense account, ther allowances
				ĺ	
					
2 Compensation of five highest-paid employees (of	her than those included	on line 1 - see instruction	ns). If none, enter 'NO	ONE.	
(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 t employee bene plans and deferr compensation	fit i ot	xpense account, ther allowances
NONE					
		-			
	 -				
				1	
Total number of other employees paid over \$50,000)			▶	
BAA	TEEA0306L 0	7/10/13		For	m 990-PF (2013)

Form 990-PF (2013) HELMS FAMILY FOUNDATION 20-3794532 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 i	nstructions). 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 statistic	cal information such as the number of	
organizations and other beneficiaries served, conferences convened, research papers produced, etc	an information such as the number of	Expenses
1 N/A		
2		
3		
*		
4		
Part IX-B Summary of Program-Related Investments (see Instru	uctions)	·
Describe the two largest program-related investments made by the foundation during the	ne tax year on lines 1 and 2	Amount
1		
<u>N/A</u>		
2		
All other program-related investments See instructions		
3		
~		
Total. Add lines 1 through 3		0.
BAA		Form 990-PF (2013)

Га	see instructions.)	reign ic	oundations,
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc, purposes Average monthly fair market value of securities		
	Average monthly cash balances	1 a	
	Fair market value of all other assets (see instructions)	1 b	
	Total (add lines 1a, b, and c)	1 c	
	Reduction claimed for blockage or other factors reported on lines 1a and 1c	1 0	0.
•	(attach detailed explanation)		
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	· · · · · · · · · · · · · · · · · · ·
4	Cash deemed held for charitable activities Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	
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.
Par			indations 0.
<u> </u>	and certain foreign organizations check here ► □ and do not complete this part.)		aationio
1	Minimum investment return from Part X, line 6	1	
2 8	Tax on investment income for 2013 from Part VI, line 5		_
	Income tax for 2013 (This does not include the tax from Part VI)	P	
•	Add lines 2a and 2b	2 c	327.
3	Distributable amount before adjustments Subtract line 2c from line 1	3	-327.
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	-327.
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.
Par	TXII Qualifying Distributions (see instructions)		
1 a	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes Expenses, contributions, gifts, etc. – total from Part I, column (d), line 26	1 a	181,000.
	Program-related investments — total from Part IX-B	1 b	101,000.
	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2	
		> 4 2	
3	Amounts set aside for specific charitable projects that satisfy the library test (prior IRS approval required)	3 a	
_	Cash distribution test (attach the required schedule)	3 b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	181,000.
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	
	Adjusted qualifying distributions. Subtract line 5 from line 4	6	181,000.
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the four qualifies for the section 4940(e) reduction of tax in those years.	ndation	
BAA			Form 990-PF (2013)

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2012	(c) 2012	(d) 2013
1 Distributable amount for 2013 from Part XI, line 7				
2 Undistributed income, if any, as of the end of 2013				0.
a Enter amount for 2012 only			0.	
b Total for prior years: 20 , 20 , 20		0.		
3 Excess distributions carryover, if any, to 2013				- "
a From 2008				
b From 2009]			
c From 2010				
d From 2011	1			
e From 2012 185, 672.			•	
f Total of lines 3a through e	185,672.			FLFE.II.
4 Qualifying distributions for 2013 from Part XII, line 4 \(\bigsim \)\$ 181.000		. %	,	
XII, line 4 \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \				d 41 5
	* / * /		0.	* * *
 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.	19, 60. 黄芩 \$	😜 🖫	2 1 N N N N
d Applied to 2013 distributable amount	· · · · · · · · · · · · · · · · · · ·	4	· • •	* : * ; ³
e Remaining amount distributed out of corpus	181,000.	`	·	<u> </u>
5 Excess distributions carryover applied to 2013	0.	» / d* , *	**	0.
(If an amount appears in column (d), the same amount must be shown in column (a))	* * * * *	√ /÷ ₩	* / *	* *
same amount must be shown in column (a))	*	· 🕺 - 3	· / / / · · · ·	* * * *
6 Enter the net total of each column as	0 8 × 8	·> { · · · · · · · · · · · · · · · · · ·	* * / 1 .	· * * * * *
indicated below:	13 M 11 130 H.	· · · · · · · · · · · · · · · · · · ·	*	i si ny Arit 🛊
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	366,672.	h	<u> </u>	1 4 g 3 \$
b Prior years' undistributed income Subtract line 4b from line 2b		0.	* * * *	
c Enter the amount of prior years' undistribut-	, * ;		* * *	* * / ' '
ed income for which a notice of deficiency has been issued, or on which the section	3 1 2 2 3 B		♦ > , ≰	* -\$ \$
4942(a) tax has been previously assessed	/ 2 % %	0.) · * *	* 7, * *
d Subtract line 6c from line 6b Taxable	* ~ **/ >		/ · * *	** '
amount - see instructions	→ .* / ♠ ¾	0.	* * * * * *	e s in in
e Undistributed income for 2012. Subtract line 4a from	* \$ 8	(* *		4 * *
line 2a Taxable amount — see instructions			0.	. * *
f Undistributed income for 2013 Subtract lines	<i>y</i>	9/	,	
4d and 5 from line 1. This amount must be	,	* .		
distributed in 2014 7 Amounts treated as distributions out of	,	·		0.
corpus to satisfy requirements imposed				
by section 170(b)(1)(F) or 4942(g)(3) (see instructions)	0	,		
,	0.			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions)	0.			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	366,672.			
10 Analysis of line 9	300,072.			
a Excess from 2009				
b Excess from 2010				
c Excess from 2011				
d Excess from 2012 185, 672.]			
e Excess from 2013 181,000.	<u></u>			

Form 990-PF (2013) HELMS FAMILY FOU				20-379453	2 Page 10	
PartXIV Private Operating Foundations (see instructions and Part VII-A, question 9)						
1 a If the foundation has received a ruling or determined is effective for 2013, enter the date of the	ruling	,		•	4942()(5)	
	b Check box to indicate whether the foundation is a private operating foundation described in section 4942(j)(3) or					
2 a Enter the lesser of the adjusted net income from Part I or the minimum	Tax year	4.0010	Prior 3 years	1272		
investment return from Part X for each year listed	(a) 2013	(b) 2012	(c) 2011	(d) 2010	(e) Total	
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)					<u></u>	
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						
Rart XV Supplementary Information assets at any time during the	Complete this) ie year – see ir	s part only if the nstructions.)	foundation had	\$5,000 or more	in	
Information Regarding Foundation Mana a List any managers of the foundation who have close of any tax year (but only if they have NONE	e contributed more to contributed more	than \$5,000) (See	section 507(d)(2))			
b List any managers of the foundation who own a partnership or other entity) of which the NONE	10% or more of the foundation has a	e stock of a corporation 10% or greater inter	on (or an equally large est	portion of the owner	ship of	
2 Information Regarding Contribution, Gra Check here X if the foundation only make requests for funds If the foundation make complete items 2a, b, c, and d	akes contributions to	preselected charitable	le organizations and o			
a The name, address, and telephone number of	r e-mail of the perso	on to whom applicatio	ns should be address	ed		
b The form in which applications should be	submitted and info	ormation and materia	als they should inclu	de		
c Any submission deadlines						
d Any restrictions or limitations on awards,	such as by geogra	phical areas, charita	able fields, kinds of i	nstitutions, or other	factors.	

Page 11

3 Grants and Contributions Paid During the Yo	ear or Approved for Fut	ure Paymen	it	
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	substantial contributor	recipient	Contribution	
Name and address (home or business) a Paid during the year SEE STATEMENT 3	substantial contributor	recipient	Contribution	
Total			► 3a	181,000.
b Approved for future payment				101,000.
Total				
Total			► 3b	

BAA

Form **990-PF** (2013)

Part XVI-A Analysis of Income-Producing Activities

Enter gross amou	unts unless otherwise indicated		business income		section 512, 513, or 51	4 (e)
1 Program co	ange revenue	(a) Business code	(b) Amount	(c) Exclu- sion	(d) Amount	Related or exempt function income (See instructions)
1 Program se	sivice revenue.		_	code		- -
a				+		-
						
d						
е					, <u></u>	
f						
g Fees and co	ontracts from government agencies					
2 Membership	p dues and assessments					
	vings and temporary cash investments					
	and interest from securities					16,373.
	ncome or (loss) from real estate	^	· · · · · · · · · · · · · · · · · · ·			
a Debt-financ	• • •	\\				
	nanced property					
	ome or (loss) from personal property		·-			
	stment income	<u> </u>				
	from sales of assets other than inventory or (loss) from special events.					
	t or (loss) from sales of inventory	- 				
10 Gross profit11 Other rever					-	
_		6. / //	dt/ 先		n e v. de,	<u>, </u>
		 				
_				- -		
ď		 				
e			· ·			
12 Subtotal A	dd columns (b), (d), and (e)	\$ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \		1,72		16,373.
13 Total. Add	line 12, columns (b), (d), and (e)				13	
See worksheet ii	n line 13 instructions to verify calculat	ions)				
Part XVI-B F	Relationship of Activities to th	e Accomplis	hment of Exem	pt Purpos	es	
				<u> </u>		
Line No. Expla	ain below how each activity for which i mplishment of the foundation's exemp	income is report It purposes (othe	ed in column (e) of er than by providing	f Part XVI-A o I funds for su	contributed importa ch purposes). (See	intly to the e instructions)
			-,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,			
N/A			-		 _	
			<u></u>			
					 -	
						
						
						
					 	
	_ 		- •			
ı						
						

TEEA0502L 07/11/13

Form 990-PF (2013) HELMS FAMILY FOUNDATION 20-3794532 Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

1 D	d the eroppingtion direct	lu ar indiraatlu ana	one in one of the fellowing i	بالمسام والمسام والمسام والمسام			res	NO
de		of the Code (other	age in any of the following ver than section 501(c)(3) organized					
a Tra	ansfers from the reporting	ng foundation to a	noncharitable exempt organi	zation of				
(1) Cash								X
(2)	Other assets					1 a (2)		X
b Ot	her transactions:							
(1)	Sales of assets to a no	oncharitable exemi	ot organization			1 b (1)		X
(2)	(2) Purchases of assets from a noncharitable exempt organization							Х
(3)	Rental of facilities, equ	upment, or other a	ssets			1 b (3)		X
(4)	Reimbursement arrang	jements				1 b (4)		Х
(5)	Loans or loan guarante	es				1 b (5)		Х
(6)	Performance of service	es or membership	or fundraising solicitations			1 b (6)		Х
c St	arıng of facılıtıes, equipr	ment, mailing lists	, other assets, or paid emplo	yees.		1 c		X
-1.16	de e e e e e e e e e e e e e e e e e e			0.1 45.1 11.1				
d if i the an	the answer to any of the goods, other assets, or s y transaction or sharing	ervices given by the arrangement, sho	mplete the following schedule reporting foundation. If the forw in column (d) the value of	e Column (b) should all undation received less tha the goods, other assets	ways show the fair n in fair market value in , or services received	narket vali d	ue of	
(a) Line			oncharitable exempt organization	, 	nsfers, transactions, and s		ngement	ts
N/A				 	· · · · · · · · · · · · · · · · · · ·			
			· <u>· · · · · · · · · · · · · · · · · · </u>	_	·			
					-			
					· · · · · · · · · · · · · · · · · · ·			
						_		
					·			
			, 					
			_					
							•	
2 a ls de	the foundation directly or i scribed in section 501(c)	ndirectly affiliated w) of the Code (othe	rith, or related to, one or more er than section 501(c)(3)) or	tax-exempt organizations n section 527?	·	∏Yes	X	No
b If '	Yes, complete the follow	wing schedule				ب	Ш	
	(a) Name of organiza	ition	(b) Type of organizatio	n (c) Description of rela	tionship		
N/A								
	Under penalties of perjury decl	lare that I have examined	d this return, including accompanying in taxpayer) is based on all information	schedules and statements, and to	o the best of my knowledge	and belief, i	s true,	
Sign		proportion (outer than	/) //	or which preparer has any know	- 0 / 00	May the I) RS disci	155
Here			(XeKd	4 muc	2122/1	this return	1 with th	ne
TICIC	Signature of office or trustee		Date	Title	7 -	(see instr	uctions)	<u>-</u>
	Print/Type preparer's n	ame	Preparer's signature	Date	Chest Ti	PTIN	Yes	No
Da: -I			Reiso -	- 4/9/14	Check ' if		000	
Paid		POULSEN & C	OMPANY OC	17///	3cii-ciiipioyed	P01224	996	
Prepar			OMPANY, Ø.C. US DRIVE		Firm's EIN ► 86-04	204/4		
Use O		SCOTTSDALE,	AZ 85251		Bhons no 100	346-054	16	
BAA		JCCTTSDALE,	VU 02721	<u> </u>	Phone no 480	946-050		0125
						Form 990	-rr (2	U13)

Schedule B (Form 990, 990-EZ, or 990-PF)

Department of the Treasury Internal Revenue Service

Schedule of Contributors

► Attach to Form 990, Form 990-EZ, or Form 990-PF
► Information about Schedule B (Form 990, 990-EZ, 990-PF) and its instructions is at www.irs.gov/form990.

OMB No 1545-0047

2013

Schedule B (Form 990, 990-EZ, or 990-PF) (2013)

Name of the organization		Employer identification number				
HELMS_FAMILY FOUNDATION		20-3794532				
Organization type (check one)	_					
Filers of:	Section:					
Form 990 or 990-EZ	501(c)() (enter number) organization					
	private foundation					
527 political organization						
Form 990-PF	X 501(c)(3) exempt private foundation					
	4947(a)(1) nonexempt charitable trust treated as a priva	ate foundation				
	501(c)(3) taxable private foundation					
	Government of the second of th					
Check if your organization is covered by the G	eneral Rule or a Special Rule					
Note. Only a section 501(c)(7), (8), or (10) org	anization can check boxes for both the General Rule and a S	pecial Rule See instructions				
General Rule						
[X] For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor (Complete Parts I and II)						
Special Rules						
For a section 501(c)(3) organization filing F 509(a)(1) and 170(b)(1)(A)(vi) and received (2) 2% of the amount on (i) Form 990, Part	form 990 or 990-EZ that met the 33-1/3% support test of the I from any one contributor, during the year, a contribution of EVIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I ar	regulations under sections the greater of (1) \$5,000 or nd II				
For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 for use exclusively for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals Complete Parts I, II, and III						
For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use <i>exclusively</i> for religious, charitable, etc, purposes, but these contributions did not total to more than \$1,000 lf this box is checked, enter here the total contributions that were received during the year for an <i>exclusively</i> religious, charitable, etc, purpose Do not complete any of the parts unless the General Rule applies to this organization because it received nonexclusively religious, charitable, etc, contributions of \$5,000 or more during the year						
religious, charitable, etc, contributions of \$	5,000 of more during the year					
990-PF) but it must answer 'No' on Part IV, lin	, the General Rule and/or the Special Rules does not file Sch e 2, of its Form 990, or check the box on line H of its Form 9 e filing requirements of Schedule B (Form 990, 990-EZ, or 99	990-EZ or on its Form 990-PF.				

BAA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990EZ, or 990-PF.

HELMS	FAMILY FOUNDATION	20-3	794532
Part I	Contributors (see instructions). Use duplicate copies of Part I if additional space	is needed	
(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	HELMSBRISCOE PERFORMANCE GROUP, INC 20875 N. 90TH PLACE SCOTTSDALE, AZ 85255	\$300,000.	Person X Payroll Noncash (Complete Part II for noncash contributions)
(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
_ _ _		\$	Person Payroll Complete Part II for noncash contributions)
(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Complete Part II for noncash contributions)
(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person
(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person
(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person

Schedule **B** (Form 990, 990-EZ, or 990-PF) (2013)

Name of organization

Page

Employer identification number

1 of Part 1

1 to Employer identification number

1 of Part II

HELMS FAMILY FOUNDATION

20-3794532

Handli	Noncash Property (see instructions) Use duplicate copies of Part II if additional sp	pace is needed	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
	N/A		
		{	ļ
	<u> </u>	\$ \$	
_		·	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
	ļ		
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
	<u></u>	1	
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
]	
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		-	ļ
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
~ ~		_	
		\$	
BAA	Sche	dule B (Form 990, 990-EZ,	or 990-PF) (2013)

1 to

of Part III

Name of organization Employer identification number HELMS FAMILY FOUNDATION 20-3794532 Part III Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8) or (10) organizations that total more than \$1,000 for the year. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year (Enter this information once See instructions.) Use duplicate copies of Part III if additional space is needed (b) Purpose of gift (a) No. from (d)
Description of how gift is held (c) Use of gift Part I N/A (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee (d) Description of how gift is held (a) No. from Part I (b) Purpose of gift (c) Use of gift (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee (b) Purpose of gift (a) No. from (c) Use of gift (d)
Description of how gift is held Part I (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee (b) Purpose of gift (a) No. from (c) Use of gift (d) Description of how gift is held Part I (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee

2013	FEDERAL STATEMENTS				PAGE 1	
CLIENT 23412	HELMS	FAMILY FOU	NDATION		20-3794532	
4/07/14					04·13PM	
STATEMENT 1 FORM 990-PF, PART I, LINE 16B ACCOUNTING FEES						
ACCOUNTING FEES	- S TOTAL S	(A) EXPENSES PER BOOKS 820.	(B) N INVESTM INCOM	MENT ADJUSTED	(D) CHARITABLE PURPOSES \$ 0.	
STATEMENT 2 FORM 990-PF, PART I, LINE 23 OTHER EXPENSES						
BROKERAGE FEES LICENSES & FEES	- \$ TOTAL §	10.	(B) N INVESTN INCO		(D) CHARITABLE PURPOSES \$ 0.	
STATEMENT 3 FORM 990-PF, PART XV, LINE 3A RECIPIENT PAID DURING THE YE	AR					
NAME AND ADDRESS		ONEE	FOUND- ATION STATUS	PURPOSE OF GRANT	AMOUNT	
GAMMA DELTA CHAPTER OF SIGMA CHI PO BOX 247 DURANT, OK 74702	NONE			TO HELP PROVIDE FREINDSHIP, JUSTICE AND LEARNING	\$ 25,000.	
HIGHLANDS CHURCH 9050 E PINNACLE RD SCOTTSDALE, AZ 85255	NONE			TO SUPPORT MINISTRIES OF THE CHURCH	24,000.	
HOPEKIDS PO BOX 672 CAVE CREEK, AZ 85327	NONE			TO HELP SUPPORT CHILDREN WITH CANCER OR OTHER LIFE THREATENING MEDICAL CONDITIONS	15,000.	

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ZU		.5

FEDERAL STATEMENTS

PAGE 2

CLIENT 23412

HELMS FAMILY FOUNDATION

20-3794532

4/07/14

04 13PM

STATEMENT 3 (CONTINUED) FORM 990-PF, PART XV, LINE 3A RECIPIENT PAID DURING THE YEAR

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND- ATION STATUS	PURPOSE OF GRANT	 AMOUNT
CHANCES FOR CHILDREN 20343 N HAYDEN RD, SUITE 105-114 SCOTTSDALE, AZ 85255	NONE		TO HELP IMPROVE QUALITY OF LIFE BY PROVIDING ACCESS TO SPORTS, PHYSICAL EDUCATION, AND CHARACTER EDUCATION FOR YOUTH	\$ 10,000.
TEAMMATES FOR KIDS FOUNDATION 1900 WAZEE ST STE 205 DENVER, CO 80202	NONE			100,000.
CHAPARRAL HIGH ASSOCIATION OF PARENTS 6935 E GOLD DUST AVE SCOTTSDALE, AZ 85253	NONE			1,000.
ELEVATE PHOENIX 3750 W INDIAN SCHOOL RD PHOENIX, AZ 85019	NONE			5,000.
MANNY CRUZ FUND	NONE			1,000.
			TOTAL	\$ 181,000.