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### **Return of Private Foundation**

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

OMB No 1545-0052

Department of the Treasury Internal Revenue Service Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf.

Do not enter Social Security numbers on this form as it may be made public.

Open to Public Inspection

Fo	r caler	ndar year 2013 or tax year beginning			, and	ending			_
	me of for	<del></del>					r identification number		
JO	HN C	BURNEY & MARY A BURNEY CHARITABLE FOUNDATION	ON TRUST						
		d street (or PO box number if mail is not delivered to street address)		Room	/suite		22-2864947		
157	7 INDIA	AN AVE				B Telephone	number (see instruction	is)	_
City	or town	State	ZIP co	de					
<u>P0</u>	RTSM	OUTH RI	0 <u>287</u>	<u>'1                                    </u>			40 <u>1 89</u> -7986		
For	eign cou	intry name Foreign province/state/county	Foreig	n posta	l code	C If exempt	ion application is pendin	g, check here	· 🗖
G	Check	call that apply Initial return Initial return	of a former pu	blic cl	harity	D 1. Foreig	n organizations, check h	ere <b>&gt;</b>	
		☐ Final return ☐ Amended ret	urn			2. Foreig	n organizations meeting	the 85% test,	
		☐ Address change ☐ Name chang	e			-	here and attach computa		
Н	Check	type of organization X Section 501(c)(3) exempt pri	vate foundation	on			foundation status was te	rminated under	$\overline{}$
	Section	on 4947(a)(1) nonexempt charitable trust	able private fo	undat	tion	section 50	07(b)(1)(A), check here	•	Ш
ī	Fair m	narket value of all assets at J Accounting method	X Cash	T A	ccrual	F 1541			
	end of	f year (from Part II, col (c), Other (specify)		_			ndation is in a 60-month to stion 507(b)(1)(B), check	here ►	. [7]
		6) ▶ \$ 243,131 (Part I, column (d) must be	on cash basi	s)					
Pa	art i							(d) Disbursemen	nts
		amounts in columns (b), (c), and (d) may not necessarily	(a) Revenue a expenses pe			investment	(c) Adjusted net	for charitable	
		equal the amounts in column (a) (see instructions))	books		In	come	ıncome	purposes (cash basis only	v)
	1	Contributions, gifts, grants, etc , received (attach schedule)							<del></del> -
	2	Check ► ☐ If the foundation is <b>not</b> required to attach Sch B		<del></del> †					
	3	Interest on savings and temporary cash investments		4		4	····	<del></del>	
	4	Dividends and interest from securities	3	656		3,656			
	5a	Gross rents		,,,,,,		0,000			
	b	Net rental income or (loss)							$\neg$
	6a	Net gain or (loss) from sale of assets not on line 10	8	,590					
ž	b	Gross sales price for all assets on line 6a 36,823					****	<del></del>	$\neg$
Revenue	7	Capital gain net income (from Part IV, line 2)		,		8,590	·	<del></del>	$\overline{}$
Ş	8	Net short-term capital gain				,			_
-	9	Income modifications			-				,
	10a	Gross sales less returns and allowances	*		-				
	b	Less Cost of goods sold			·				
	С	Gross profit or (loss) (attach schedule)							
	11	Other income (attach schedule)		305		305			
	12	Total. Add lines 1 through 11	12	,555		12,555	305		
	13	Compensation of officers, directors, trustees, etc							
ses	14	Other employee salaries and wages	ר		17.15				
୬ <b>ଅ</b> ଅ	15	Pension plans, employee benefits	T IT	UЦ	IVE				
ୢୢଌୗ	16a	Legal fees (attach schedule)	7			);;; 1.  0;;			
200	b	Accounting fees (attach schedule)	69	V 1	S 201/	<u> </u>			
₹ <b>.월</b>	С	Other professional fees (attach schedule)	<u> </u>	д	3 201	<u>်</u>			
<b>a</b>	17	Interest			1. 1	<u> </u>			
st	18	Taxes (attach schedule) (see instructions)		DE	M. L	<u> </u>		<del></del>	
. <u>Ē</u>	19	Depreciation (attach schedule) and depletion				<del></del>			
Ę,	20	Occupancy							
۲	21	Travel, conferences, and meetings							
nd	22	Printing and publications							
a	23	Other expenses (attach schedule)	<u> </u>	97	,	97		<u> </u>	
Operating and Administrative Expo	24	Total operating and administrative expenses.							_
rat		Add lines 13 through 23		97		97	0	· 	0
be	25	Contributions, gifts, grants paid		,215				11,2	
Ō	26	Total expenses and disbursements. Add lines 24 and 25	11	,312		97	0	11,2	<u>:15</u>
	27	Subtract line 26 from line 12							1
	а	Excess of revenue over expenses and disbursements	1	,243					
	b	Net investment income (If negative, enter -0-)				12,458	<u> </u>		
	С	Adjusted net income (if negative, enter -0-)					305		

P-	ırtıll	Balance Sheets Attached schedules and amounts in the description column	Beginning of year	End o	f year
.ге —	HOIL	should be for end-of-year amounts only (See instructions )	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash—non-interest-bearing	16,890	11,686	11,686
٠	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 instructions) .			
	7	Other notes and loans receivable (attach schedule)			
	·	Less. allowance for doubtful accounts			
g	8	Inventories for sale or use			
Assets	9	Prepaid expenses and deferred charges .			
Ş	10a	Investments—U.S. and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	160,940	167,196	231,445
		Investments—corporate stock (attach schedule)	100,940	107, 1901	
	C	Investments land huldings and agricment hasis			
	11	Investments—land, buildings, and equipment basis			
	40	Less accumulated depreciation (attach schedule)			
]	12	Investments—mortgage loans	<del></del>		
	13	Investments—other (attach schedule)			<del></del>
	14	Land, buildings, and equipment basis			
		Less accumulated depreciation (attach schedule)			
ı	15	Other assets (describe  )			
İ	16	Total assets (to be completed by all filers—see the			
	•	ınstructions Also, see page 1, item I)	177,830	178,882	243,131
	17	Accounts payable and accrued expenses			
S	18	Grants payable			
Liabilities	19	Deferred revenue			
<u>=</u>	20	Loans from officers, directors, trustees, and other disqualified persons			
i.	21	Mortgages and other notes payable (attach schedule)			
7	22	Other liabilities (describe  )			
	23	Total liabilities (add lines 17 through 22)	0	0	
<b>(</b> 0		Foundations that follow SFAS 117, check here			
alances		and complete lines 24 through 26 and lines 30 and 31.			
ğ	24	Unrestricted			
E	25	Temporarily restricted			Ì
뜅	26	Permanently restricted			İ
Net Assets or Fund B		Foundations that do not follow SFAS 117, check here			!
뜨		and complete lines 27 through 31.			
9	27	Capital stock, trust principal, or current funds			
ts	28	Paid-in or capital surplus, or land, bldg, and equipment fund			
SS	29	Retained earnings, accumulated income, endowment, or other funds	177,830	178,882	
₹	30	Total net assets or fund balances (see instructions)	177,830	178,882	
<u>e</u>	31	Total liabilities and net assets/fund balances (see			
~	_	instructions)	177,830	178,882	
Рa	rt III	Analysis of Changes in Net Assets or Fund Balances			
_		net assets or fund balances at beginning of year—Part II, column (a),	line 30 (must agree v	vith	
•		of-year figure reported on prior year's return)	, (,	1 1	177,830
2		amount from Part I, line 27a		2	1,243
		and the second s		3	
		ines 1, 2, and 3		. 4	179,073
_				. 5	191
5		eases not included in line 2 (itemize) FEDERAL TAX net assets or fund balances at end of year (line 4 minus line 5)—Part	II column (b) line 30		178,882
J	iotai	not accord or raine balances at one of year (line 4 fillings line 0)—I are	, 55,5,7,7, (5), 111,6 50	L • I	170,002

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Part	V Capital Gains an	d Losses for Tax on Investr	nent Ir	ncome				
		the kind(s) of property sold (e.g., real estate ouse, or common stock, 200 shs MLC Co.)			(b) How acquired P—Purchase D—Donation		Date acquired no , day, yr )	(d) Date sold (mo , day, yr )
*1a	240 ARCHER DANIELS				Р		1/2/2006	5/30/2013
<u>b</u>	190 HP				Р		5/22/2009	5/2/2013
c	42 NEWMARKET				Р		8/27/2009	2/22/2013
<u>d</u>	140 ROCK TENN				Р		9/16/2009	6/10/2013
<u>e</u>								
	(e) Gross sales price	(f) Depreciation allowed (or allowable)			other basis nse of sale		(h) Gain (e) plus (f)	or (loss) minus (g)
a	8,045				11,143		· · · · · · · · · · · · · · · · · · ·	-3,098
b	3,880				6,516			-2,636
c	10,459		<u> </u>		3,499			6,960
<u>d</u>	14,439				7,075			
e								
	Complete only for assets sl	howing gain in column (h) and owned	by the	foundation	on 12/31/69			(h) gain minus
	(i) FM V as of 12/31/69	(j) Adjusted basis as of 12/31/69			s of col (i) (j), if any			less than -0-) <b>or</b> om coi (h)) 
a			ļ					-3,098
b								-2,636
<u>c</u>	<del></del>							6,960
<u>d</u>								7,364
<u>e</u>		L	<u> </u>					
2	Capital gain net income or	r (net canital legs) 1		nter in Par -0- in Par	7 1	2		8,590
3	Net short-term capital gair	n or (loss) as defined in sections 1	1222(5)	and (6)		1		
	If gain, also enter in Part I	, line 8, column (c) (see instruction	ns) If (I	loss), ente	er-0-ın l			
	Part I, line 8					3		0
Wast	tion 4940(d)(2) applies, leavenees, leavenee	re this part blank section 4942 tax on the distributa qualify under section 4940(e) Do	ble amo	ount of an	y year in the base s part	e perio	od?	Yes No
1	<del></del>	ount in each column for each year			<del></del>	ng anv	entries	<del></del>
<u> </u>	(a)		, <del>000 (</del>	10 111011 0011		.g a,	<u> </u>	(d)
0-1	Base period years endar year (or tax year beginning in	(b) Adjusted qualifying distributions	s	Net value o	(c) f noncharitable-use as	sets		ibution ratio ivided by col (c))
Cai	2012	<del></del>	0.506		18	1,997	(coi (b) d	0 057726
	2011	<del></del>	8,180			3,315		0 045874
	2010	<del></del>	5,475			7,655	<del>-</del>	0 030818
	2009		4,858			7,615		0 032910
	2008		6,869			358		0 045990
		<del></del>	0,0001			,,,,,,,		
2	Total of line 1, column (d)						2	0 213318
3		for the 5-year base period—divide	e the tot	tal on line	2 by 5, or by the			
		dation has been in existence if les				}	3	0 042664
4	Enter the net value of non	charitable-use assets for 2013 fro	m Part	X, line 5			4	213,415
5	Multiply line 4 by line 3						5	9,105
6	Enter 1% of net investmen	nt income (1% of Part I, line 27b)					6	125
7	Add lines 5 and 6						7	9,230
8	Enter qualifying distribution	ins from Part XII, line 4				Ì	8	11,215
		ater than line 7, check the box in F	Part VI,	line 1b, ar	nd complete that p	oart us	sing a 1% tax	rate See the

Form 990-PF (2013) Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see instructions) 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) Domestic foundations that meet the section 4940(e) requirements in Part V, check 1 249 here ▶ ☐ and enter 1% of Part I, line 27b 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-) 0 3 249 3 Add lines 1 and 2 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 -0-5 249 2013 estimated tax payments and 2012 overpayment credited to 2013 6a а Exempt foreign organizations—tax withheld at source 6b Tax paid with application for extension of time to file (Form 8868) 6c Backup withholding erroneously withheld 6d Total credits and payments Add lines 6a through 6d 7 0 7 8 8 9 249 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 9 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 0 11 11 Enter the amount of line 10 to be Credited to 2014 estimated tax 0 Part VII-A **Statements Regarding Activities** During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it Yes Νo participate or intervene in any political campaign? 1a Χ Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)? 1b 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 1c Х c Did the foundation file Form 1120-POL for this year? Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (2) On foundation managers ►\$ (1) On the foundation > \$ 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 Х If "Yes," attach a detailed description of the activities Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles 3 of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes 3 Х Did the foundation have unrelated business gross income of \$1,000 or more during the year? Χ 4a 4a N/A 4b If "Yes." has it filed a tax return on Form 990-T for this year? 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? 5 Х If "Yes," attach the statement required by General Instruction T Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either 6 By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that Х conflict with the state law remain in the governing instrument? 6 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 Х Enter the states to which the foundation reports or with which it is registered (see instructions) b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General Х (or designate) of each state as required by General Instruction G? If "No," attach explanation 8b 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 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? If 9 "Yes," complete Part XIV Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their 10 names and addresses 10

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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 2013?

4b

Total number of other employees paid over \$50,000

JOHN C BURNEY & MARY A BURNEY CHARITABLE FOUNDATION TRUST Form 990-PF (2013) 22-2864947 Page 6 Statements Regarding Activities for Which Form 4720 May Be Required (continued) Part VII-B During the year did the foundation pay or incur any amount to Yes X No (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? (2) Influence the outcome of any specific public election (see section 4955), or to carry on, X No directly or indirectly, any voter registration drive? Yes (3) Provide a grant to an individual for travel, study, or other similar purposes? X No Yes (4) Provide a grant to an organization other than a charitable, etc., organization described in ☐ Yes X No section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions) (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 X No 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)? N/A 5b  $\Box$ Organizations relying on a current notice regarding disaster assistance check here If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax Yes X No because it maintained expenditure responsibility for the grant? If "Yes," attach the statement required by Regulations section 53 4945-5(d) Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums Yes X No on a personal benefit contract? Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? 6b Х If "Yes" to 6b, file Form 8870 Yes No At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? Х Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, Part VIII and Contractors List all officers, directors, trustees, foundation managers and their compensation (see instructions). (c) Compensation (d) Contributions to (b) Title, and average (e) Expense account, (a) Name and address hours per week (If not paid, employee benefit plans other allowances devoted to position enter -0-) and deferred compensation JOHN C BURNEY TTEE 157 INDIAN AVE PORTSMOUTH, RI 02871 1 00 MARY A BURNEY TTEE 157 INDIAN AVE PORTSMOUTH, RI 02871 1 00 2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE." (d) Contributions to (b) Title, and average employee benefit (e) Expense account, (a) Name and address of each employee paid more than \$50,000 hours per week (c) Compensation plans and deferred other allowances devoted to position compensation NONE

Pa	Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Er and Contractors (continued)	nployees,
3	Five highest-paid independent contractors for professional services (see instructions). If none, enter "NOI	NE."
$\overline{\cdot}$	(a) Name and address of each person paid more than \$50,000 (b) Type of service	(c) Compensation
NO	NE	
		ļ
	<del></del>	
Tota	al number of others receiving over \$50,000 for professional services	
		<u> </u>
P	art IX-A Summary of Direct Charitable Activities	
	st the foundation's four largest direct chantable activities during the tax year. Include relevant statistical information such as the number of	5::22
	ganizations and other beneficianes served, conferences convened, research papers produced, etc	Expenses
1	U S MILITARY ACADEMY	
		750
2	PRESBYTERIAN CHURCH	
•	ADMY EMERCENCY DELIEF	
3	ARMY EMERGENCY RELIEF	
		800
4	CENTER FOR MILITARY READINESS	
		350
Pa	art IX-B Summary of Program-Related Investments (see instructions)	
D	escribe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1		
	,	
_		
2		
——————————————————————————————————————	l other program-related investments. See instructions	
3		
•		ĺ
Tota	al. Add lines 1 through 3	0

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Form 9	90-PF (2013) JOHN C BURNEY & MARY A BURNEY CHARITABLE FOUNDATION TRUST	22-2864947	Page <b>8</b>
Part	X Minimum Investment Return (All domestic foundations must complete this part. Foreign	n foundations,	
	see instructions )		
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc.		
٠	purposes		
а	Average monthly fair market value of securities	1a	202,37
b	Average of monthly cash balances	1b	14,288
С	Fair market value of all other assets (see instructions)	1c	
d	Total (add lines 1a, b, and c) .	1d	216,669
е	Reduction claimed for blockage or other factors reported on lines 1a and	د جعالي	
	1c (attach detailed explanation)	_ند_	
2	Acquisition indebtedness applicable to line 1 assets	_2	
3	Subtract line 2 from line 1d	3	216,665
4	Cash deemed held for charitable activities Enter 1 ½ % of line 3 (for greater amount, see		
	instructions)	4	3,250
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	213,415
6	Minimum investment return. Enter 5% of line 5	6	10,671
<b>Part</b>			
	foundations and certain foreign organizations check here   and do not complete this part )		
1	Minimum investment return from Part X, line 6	1	10,671
2a	Tax on investment income for 2013 from Part VI, line 5		
b	Income tax for 2013 (This does not include the tax from Part VI)	ļ <u></u>	
С	Add lines 2a and 2b	2c	249
3	Distributable amount before adjustments Subtract line 2c from line 1	3	10,422
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	10,422
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	10,422
Part	XII Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		-
а	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26	1a	11,215
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		
а	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	11,215
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	11,215
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating wheth	ner the foundati	
	qualifies for the section 4940(e) reduction of tax in those years		

Form 990-PF (2013)

Part	<b>XIII</b> Undistributed Income (see instructions)	<u> </u>			
1	Distributable amount for 2013 from Part XI,	(a) Corpus	(b) Years prior to 2012	(c) 2012	(d) 2013
_	line 7				10,422
2	Undistributed income, if any, as of the end of 2013				
а	Enter amount for 2012 only			0	
b	Total for prior years 20, 20, 20				
3	Excess distributions carryover, if any, to 2013				
a	From 2008	İ			
b	From 2009				
C	From 2010				
d	From 2011				
e	From 2012 1,597	4.507			-
f	Total of lines 3a through e	1,597		<b></b>	
4	Qualifying distributions for 2013 from Part XII, line 4  \$ 11,215				
_		ļ			
a	Applied to 2012, but not more than line 2a  Applied to undistributed income of prior years				
b	(Election required—see instructions)				
_	Treated as distributions out of corpus (Election				
·	required—see instructions)				
d	Applied to 2013 distributable amount				10,422
e	Remaining amount distributed out of corpus	793			10,422
5	Excess distributions carryover applied to 2013	700			
	(If an amount appears in column (d), the same	<del></del>		-	
	amount must be shown in column (a) )				
6	Enter the net total of each column as				
•	indicated below:				
а	Corpus Add lines 3f, 4c, and 4e Subtract line 5	2,390			
b	Prior years' undistributed income Subtract				
	line 4b from line 2b	ļ	0	:	
С	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				
е	Undistributed income for 2012 Subtract line				
	4a from line 2a Taxable amount—see				
	instructions			0	
f	Undistributed income for 2013 Subtract lines				
	4d and 5 from line 1 This amount must be	[			•
_	distributed in 2014				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)		<del></del>		
8	Excess distributions carryover from 2008 not				
_	applied on line 5 or line 7 (see instructions)	<del></del>			-
9	Excess distributions carryover to 2014.	0.000			
40	Subtract lines 7 and 8 from line 6a	2,390			
10	Analysis of line 9				
a	Excess from 2009				
b	Excess from 2010				
C	Excess from 2011				
d	Excess from 2012 1,597  Excess from 2013 793				
-	Excess 1000 701.1 / MAL			i .	

factors

Part XV Supplementary Information (continued)

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

Becipient San individual, Foundation

Recipient	If recipient is an individual, show any relationship to	Foundation status of	Purpose of grant or	Amount
Name and address (home or business)	any foundation manager or substantial contributor	recipient	contribution	
a Paid during the year U S MILITARY ACADEMY				750
WEST POINT, NY USO				325
WASHINGTON, DC ARMY EMERGENCY RELIEF				800
WASHINGTON, DC PRESBYTERIAN CHURCH				5,000
NEWPORT, RI CENTER FOR MILITARY READINESS				350
WASHINGTON, DC NAVAL WAR COLLEGE FOUNDATION				250
NEWPORT, RI AMERICAN RED CROSS				200
WASHINGTON, DC AMERICAN CANCER SOCIETY				250
NEWPORT, RI VETERANS OF FOREIGN WARS				150
WASHINGTON, DC NUMEROUS OTHER NON PROFITS				3,140
Total			<b>▶</b> 3a	11,215
b Approved for future payment			- Ja	11,213
Total		<u> </u>		0

Ente							
	er gros	ss amounts unless otherwise indicated	Unrelated bu	isiness income	Excluded by sect	on 512, 513, or 514	(0)
			(5)	<b>1</b>	(-)	4.45	(e) Related or exempt
•			(a) Business code	(b) Amount	(c) Exclusion code	( <b>d)</b> Amount	function income
1	Prog	ram service revenue	business code	_ Amount	LxGusion code	Amount	(See instructions )
	а						<u> </u>
	_			<u> </u>			
	ď		-				
	е —			<del></del>			
	Ţ -		<del></del>		-		
	' =		<del></del>	<del> </del>	<del> </del> -		<del></del>
	_	Fees and contracts from government agencies		ļ —			
2		nbership dues and assessments					
3	Intere	est on savings and temporary cash investments					4
4	Divid	dends and interest from securities					3,656
5	Net r	rental income or (loss) from real estate					
		Debt-financed property					
		Not debt-financed property					
6		rental income or (loss) from personal property					
7		er investment income					
_				<del> </del>	<del> </del>		
8		or (loss) from sales of assets other than inventory		<del></del>	<del> </del>		
9		ncome or (loss) from special events		<del> </del> -			
10		ss profit or (loss) from sales of inventory	ļ	ļ <u>.</u>			
11	Othe	er revenue a					
	b _						
	С _						
	d						
	e —				]		
12	Subt	total Add columns (b), (d), and (e)		0		0	3,660
		I. Add line 12, columns (b), (d), and (e)	L	<u> </u>		13	3,660
		sheet in line 13 instructions to verify calculations	: )				
•	rt XV			ent of Evennt	Purnoses		
	e No.	<del></del>					<del></del>
	▼	Explain below how each activity for which incom accomplishment of the foundation's exempt pur	poses (other than	by providing fund	s for such purpos	es) (See instruction	ons )
3	<u>,4,8</u>	COMPLIES WITH PART I (PURPOSE OF THE			UPPORTING V	ARIOUS	
				TIONS			
		EDUCATIONAL, RELIGIOUS AND CHARITAB	LE ORGANIZAT	10110			
		EDUCATIONAL, RELIGIOUS AND CHARITAB	LE ORGANIZAT	10110			
		EDUCATIONAL, RELIGIOUS AND CHARITAB	LE ORGANIZAT	10110			
		EDUCATIONAL, RELIGIOUS AND CHARITAB	LE ORGANIZAT				
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		EDUCATIONAL, RELIGIOUS AND CHARITAB	LE ORGANIZAT				
		EDUCATIONAL, RELIGIOUS AND CHARITAB	LE ORGANIZAT				

Form 99	0-PF (201	3) JOHN C	BURNEY & MARY A	A BURNEY CH	ARITABLE FO	UNDATION	I TRUST		22-2864947	Pa	ige 13
Part	XVII	Information Exempt Org	Regarding Tran ganizations	sfers To and	d Transactio	ns and Ro	elationship	s With N	loncharitabl	•	
1	Did the	organization d	lirectly or indirectly e	engage in any o	of the following	with any ot	her organiza	tion descr	ıbed	Yes	No
•	ın secti	on 501(c) of the	e Code (other than s	section 501(c)(	3) organizatio	ns) or in sec	tion 527, rela	ating to po	litical		
	organiz	ations?									
а	Transfe	ers from the rep	porting foundation to	a noncharitab	le exempt orga	anization of					
	(1) Cas	sh .							1a(*	)	Х
	(2) Oth	er assets							1a(2	2)	X
b	Other to	ransactions.									
	(1) Sale	es of assets to	a noncharitable exe	empt organizati	on				1b(		Х
	(2) Pur	chases of asse	ets from a noncharita	able exempt or	ganization				1b(2	2)	_X
	(3) Rer	ntal of facilities,	equipment, or othe	r assets					1b(	3)	X
	(4) Rei	mbursement ar	rrangements						1b(4	1)	X
	(5) Loa	ns or loan guar	rantees						1b(	5)	X
	(6) Per	formance of se	rvices or membersh	np or fundraisir	ng solicitations				1b(	5)	Х
С	Sharing	of facilities, ed	quipment, mailing lis	sts, other asset	s, or paid emp	loyees			1c		X
d	If the an	swer to any of t	he above is "Yes," co	mplete the follow	wing schedule.	Column (b) s	hould always	show the fa	air market		
	value of value in	the goods, other any transaction	er assets, or services or sharing arrangem	given by the rep ent, show in col	porting foundate umn (d) the val	on If the four ue of the goo	ndation receiveds, other ass	ed less tha ets, or serv	n fair market ices received		
(a) Line	no (b)	Amount involved	(c) Name of non	charitable exempt	organization	(d) Des	cription of transf	ers, transactı	ons, and sharing ar	angemer	ıts
									·		
					··					_	
	l_		L								
						<u> </u>					
2a b	describ	ed in section 5 complete the	ctly or indirectly affili 01(c) of the Code (c following schedule	other than secti	on 501(c)(3))	or in section				X N	lo
		(a) Name of organ	nization	(b)	Type of organization	n		(c) Descript	tion of relationship		
		<del></del>		<del></del>							
									<del></del>		
				<del> </del>						_	
		<del>_</del>		<del> </del>							
	Linder ne	nalties of negury 1 dec	lare that I have examined this	return including accord	nanving schedules ar	d statements, and	to the best of my k	nowledge and b	elief it is true		
C:			on of preparer (other than taxp	•			•	nomicage and b			
Sign		LPR		16/	12/11	Trus	•		May the IRS discu with the preparer s		
Here		um of officer or lave	andy_		Title		re_		(see instructions)?		
	1 1.7	ure of officer or trus Print/Type preparer's		Date Date			Date	<del></del>	PTIN		
Paid	1			Preparer's sig	mature				ck X if	4 4 5 5 5	
Prep	arer⊢	LFRED D SILV	/IA JR				4/28/20			14860	
Use	Only	irm's name	407.054.05	VEX.E 0 = = = :	20012 1222			Firm's EIN		001	
	J F	irm's address 🕨	127 BEACON ST, I	NEWPORT, RI	02840-1235			Phone no	(401) 846-7		
									Form 9	90-PF	(2013)

### Schedule B

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

Department of the Treasury

Name of the organization

Internal Revenue Service

Schedule of Contributors

Attach to Form 990, Form 990-EZ, or Form 990-PF.

**Employer identification number** 

OMB No 1545-0047

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

JOHN C BURNEY & MARY A BURNEY CHARITABLE FOUNDATION TRUST 22-2864947 Organization type (check one) Filers of: Section: Form 990 or 990-EZ 501(c)( ) (enter number) organization 4947(a)(1) nonexempt charitable trust not treated as a private foundation 527 political organization 501(c)(3) exempt private foundation Form 990-PF 4947(a)(1) nonexempt charitable trust treated as a private foundation 501(c)(3) taxable private foundation Check if your organization is covered by the General Rule or a Special Rule. Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special 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 Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and 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 exclusively for religious, charitable, etc., purposes, but these contributions did not total to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an exclusively 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

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it must answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

Name of organization

JOHN C BURNEY & MARY A BURNEY CHARITABLE FOUNDATION TRUST

Employer identification number 22-2864947

Part I	Contributors (see instructions) Use duplicate co	pies of Part I if additional space is	
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	NONE  Foreign State or Province  Foreign Country	\$	Person Payroli Noncash (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
	Foreign State or Province Foreign Country	\$	Person Payroll Oncash (Complete Part II for noncash contributions )
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
	Foreign State or Province Foreign Country	\$	Person Payroll Noncash (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
	Foreign State or Province Foreign Country	\$	Person Payroll Noncash (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
	Foreign State or Province Foreign Country	_	Person Payroll Noncash (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
	Foreign State or Province Foreign Country	_	Person Payroll Noncash (Complete Part II for noncash contributions)

Name of organization
JOHN C BURNEY & MARY A BURNEY CHARITABLE FOUNDATION TRUST

Employer identification number 22-2864947

Part II	Noncash Property (see instructions) Use duplicate copies of Part II if additional space is needed						
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received				
		\$					
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received				
		\$					
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received				
		\$					
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received				
		\$					
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received				
		\$					
(a) No. from Part I	(b)  Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received				
		\$					

Name of or I∩HM ∩ BI	ganization URNEY & MARY A BURNEY CHARITABLE FOUNI	DATION TRUST	Employer identification number 22-2864947				
Part III	Exclusively religious, charitable, etc., individuational more than \$1,000 for the year. Complete of For organizations completing Part III, enter the tocontributions of \$1,000 or less for the year (Enter Use duplicate copies of Part III if additional space	ual contributions to section columns (a) through (e) and the otal of exclusively religious, cher this information once. See in	501(c)(7), (8), or (10) organizations ne following line entry aritable, etc.				
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held				
		(e) Transfer of gift					
	Transferee's name, address, and ZIP + 4	Relatio	onship of transferor to transferee				
( . \ <u> </u>	For Prov Country						
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held				
	(e) Transfer of gift						
	7						
	Transferee's name, address, and ZIP + 4	Relatio	onship of transferor to transferee				
	For Prov Country						
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held				
		( ) To a fact of the					
	(e) Transfer of gift						
	Transferee's name, address, and ZIP + 4	4 Relatio	onship of transferor to transferee				
	For Prov Country						
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held				
-							
		(e) Transfer of gift	<u> </u>				
	Transferee's name, address, and ZIP + 4	# Relatio	onship of transferor to transferee				
	For Prov						

### Part I, Line 6 (990-PF) - Gain/Loss from Sale of Assets Other Than Inventory

Sairt	oss	8,590	0		-		Net Gain	or Loss	-3,098	-2,636	096'9	7,364
Net Gairr	Or LOSS							Adjustments				
Cost, Other	Expenses	28,233	0					Depreciation				
Cost,	Basis and Expenses			Expense	of Sale and	Cost of	Improve-	ments			l	
	1	36,823	0				Valuation	Method				
Gross	Sales						Cost or	Other Basis	11,143	6,516	3,499	7,075
Totals	_	Capital Gains/Losses	Other sales				Gross Sales	Pnce	8,045	3,880	10,459	14,439
		Š					Date	Sold	5/30/2013	5/2/2013	2/22/2013	6/10/2013
			ı				Acquisition	Method	Ь	Ь	Ь	Ь
							Date	Acquired	1/2/2006	5/22/2009	8/27/2009	9/16/2009
					Check "X" if	Purchaser	Sa	Business				
								Purchaser				
	Amount							CUSIP#				
		Long Term CG Distributions	Short Term CG Distributions					Description	240 ARCHER DANIELS	190 HP	42 NEWMARKET	140 ROCK TENN
						Check "X"	to include	n Part IV	×	1		
				L			_		-	7	~	4

Part I, Line 11 (990-PF) - Other Income

		305	305	305
•		Revenue		
-		and Expenses	Net Investment	Adjusted
	Description	per Books	Income	Net Income
	1 ORDINARY INCOME FROM PARTNERSHIP	305	305	305

Part I, Line 18 (990-PF) - Taxes

		0	0	C	0
	Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
1	Real estate tax not included in line 20				
2	Tax on investment income				
3	Income tax				

Part I, Line 23 (990-PF) - Other Expenses

		97	97	(	0
	Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
1	BROKERAGE FEE	81	81		
2	POSTAGE	16	16		

## Part II, Line 10b (990-PF) - Investments - Corporate Stock

			160,940	167,196	173,307	231,445
		Num Shares/	Book Value	Book Value	FMV	FMV
	Description	Face Value	Beg of Year	End of Year	Beg of Year	End of Year
-	ARCHER DANIELS	240	11,143	0	6,574	0
7	AMEDISYS	180	7,506	7,506	2,035	2,633
က	APPLE	12	8,366	8,366	986,9	6,732
4	CARDINAL HEALTH	100	5/175	5,775	4,118	6,681
2	UNIFIRST	160	7,924	7,924	11,731	17,120
9	IBM	44	12,972	12,972	8,428	8,253
7	JOHNSON & JOHNSON	100	7,071	7,071	7,010	9,159
8	XEROX	838	4,945	4,945	5,715	10,198
၈	LOCKHEED MARTIN	84	8,842	8,842	7,752	12,487
9	╀═	160	7,995	7,995	8,563	12,386
Ξ	ALLIANCE RES PARTNERS	146	7,636	7,636	9,344	11,242
12	PEPSICO	91	11,049	11,049	6,227	7,547
5	XCT	300	4,310	4,310	12,735	19,119
14	HEWLITT PACKARD	190	6,516	0	2,708	0
15	LAB CP OF AMERICA	30	1,821	1,821	2,599	2,741
16	⊢	42	666'9	3,500	22,025	14,034
12	RAYTHEON	150	6,708	6,708	8,484	13,605
18	ROCK TENN	140	7,075	0	6,787	0
19	SILGAN	280	7,356	7,356	11,631	13,446
8	DOVER	96	0	209'2	0	9,268
72	CHEVRON	75	8,126	8,126	8,111	9,368
22	LILLY ELI	230	10,805	10,805	11,344	11,730
23	GLOBAL PAYMENTS	180	0	8,494	0	11,698
24	HELMRICH & PAYNE	130	0	8,542	0	10,930
52	KROGER	280	0	9,848	0	11,068

# Part VIII, Line 1 (990-PF) - Compensation of Officers, Directors, Trustees and Foundation Managers

		"A" You			-				Avg Hrs			Expense
	o Eco	f Risiness	Street	ÇİÇ	State	Zip Code	Foreign Country	Title	Per Week	Compensation	Benefits	Account
	JOHN C BURNEY		157 INDIAN A		<u>8</u>	12871		тее	1 00	<del></del>		
-												
-	MARY A BURNEY		157 INDIAN AVE	PORTSMOUTH	الا 0	02871		ЩЕ	9			
7										_		