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## Return of Private Foundation

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

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Information about Form 990-PF and its separate instructions is at [www.irs.gov/form990pf](http://www.irs.gov/form990pf).

2013

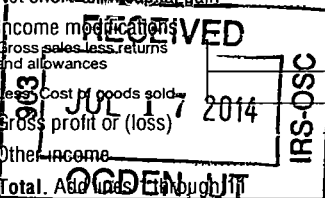
Open to Public Inspection

For calendar year 2013 or tax year beginning

, and ending

Name of foundation <b>JOHN STAUFFER CHARITABLE TRUST</b>		A Employer identification number <b>23-7434707</b>
Number and street (or P O box number if mail is not delivered to street address) <b>301 N. LAKE AVE., SUITE 1000</b>	Room/suite	B Telephone number <b>626-793-9400</b>
City or town, state or province, country, and ZIP or foreign postal code <b>PASADENA, CA 91101-5123</b>		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) <b>\$ 49,596,607.</b>	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities		1,416,181.	1,416,181.		STATEMENT 1
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		1,310,526.			
b Gross sales price for all assets on line 6a <b>7,411,107.</b>					
7 Capital gain net income (from Part IV, line 2)			1,310,526.		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less: Cost of goods sold					
c Gross profit or (loss)					
11 Other income					
12 Total. Add lines 1 through 11		2,726,707.	2,726,707.		
13 Compensation of officers, directors, trustees, etc		416,898.	166,758.		250,140.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees STMT 2		3,168.	2,407.		761.
b Accounting fees STMT 3		3,900.	3,510.		390.
c Other professional fees STMT 4		128,269.	128,269.		0.
17 Interest					
18 Taxes STMT 5		82,324.	82,282.		42.
19 Depreciation and depletion					
20 Occupancy		<2,063.>	<1,568.>		<495.>
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses STMT 6		121,300.	121,300.		0.
24 Total operating and administrative expenses. Add lines 13 through 23		753,796.	502,958.		250,838.
25 Contributions, gifts, grants paid		1,260,700.			1,260,700.
26 Total expenses and disbursements. Add lines 24 and 25		2,014,496.	502,958.		1,511,538.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		712,211.			
b Net investment income (if negative, enter -0-)			2,223,749.		
c Adjusted net income (if negative, enter -0-)				N/A	



**Part II. Balance Sheets** Attached schedules and amounts in the description column should be for end-of-year amounts only

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>Assets</b>	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	547,259.	1,145,589.	1,145,589.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations STMT 7	5,816,766.	3,719,348.	3,874,073.
	b Investments - corporate stock STMT 8	20,954,257.	20,146,789.	33,092,708.
	c Investments - corporate bonds STMT 9	8,247,232.	11,253,221.	11,403,601.
	11 Investments - land, buildings, and equipment basis ▶			
Less accumulated depreciation ▶				
12 Investments - mortgage loans STMT 10	28,623.	21,737.	24,234.	
13 Investments - other				
14 Land, buildings, and equipment: basis ▶				
Less accumulated depreciation ▶				
15 Other assets (describe ▶ STATEMENT 11)	36,738.	56,402.	56,402.	
16 <b>Total assets</b> (to be completed by all filers - see the instructions. Also, see page 1, item 1)	35,630,875.	36,343,086.	49,596,607.	
<b>Liabilities</b>	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			
	22 Other liabilities (describe ▶)			
	23 <b>Total liabilities</b> (add lines 17 through 22)	0.	0.	
<b>Net Assets or Fund Balances</b>	<b>Foundations that follow SFAS 117, check here</b> ▶ <input type="checkbox"/>			
	<b>and complete lines 24 through 26 and lines 30 and 31</b>			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	<b>Foundations that do not follow SFAS 117, check here</b> ▶ <input checked="" type="checkbox"/>			
	<b>and complete lines 27 through 31.</b>			
	27 Capital stock, trust principal, or current funds	35,630,875.	36,343,086.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	0.	0.	
30 <b>Total net assets or fund balances</b>	35,630,875.	36,343,086.		
31 <b>Total liabilities and net assets/fund balances</b>	35,630,875.	36,343,086.		

**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	35,630,875.
2 Enter amount from Part I, line 27a	2	712,211.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	36,343,086.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 <b>Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30</b>	6	36,343,086.

**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.)
<b>1a CHARLES SCHWAB #9835-ST</b>		<b>VARIOUS</b>	<b>12/31/13</b>
<b>b CHARLES SCHWAB #9835-LT</b>		<b>VARIOUS</b>	<b>12/31/13</b>
<b>c SETTLEMENTS</b>		<b>VARIOUS</b>	<b>12/31/13</b>
<b>d CAPITAL GAINS DIVIDENDS</b>			
<b>e</b>			

(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)
<b>a 131,886.</b>		<b>131,886.</b>	<b>0.</b>
<b>b 7,276,763.</b>		<b>5,968,695.</b>	<b>1,308,068.</b>
<b>c 2,425.</b>			<b>2,425.</b>
<b>d 33.</b>			<b>33.</b>
<b>e</b>			

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
<b>a</b>			<b>0.</b>
<b>b</b>			<b>1,308,068.</b>
<b>c</b>			<b>2,425.</b>
<b>d</b>			<b>33.</b>
<b>e</b>			

<b>2 Capital gain net income or (net capital loss)</b>	<b>2</b>	<b>1,310,526.</b>
<b>3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):</b> If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8	<b>3</b>	<b>N/A</b>

**Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income**

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

**1** Enter the appropriate amount in each column for each year; see the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2012	822,264.	50,865,701.	.016165
2011	1,092,606.	41,158,412.	.026546
2010	1,399,377.	39,184,712.	.035712
2009	2,015,326.	37,248,434.	.054105
2008	577,144.	37,098,222.	.015557

<b>2 Total of line 1, column (d)</b>	<b>2</b>	<b>.148085</b>
<b>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</b>	<b>3</b>	<b>.029617</b>
<b>4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5</b>	<b>4</b>	<b>46,654,463.</b>
<b>5 Multiply line 4 by line 3</b>	<b>5</b>	<b>1,381,765.</b>
<b>6 Enter 1% of net investment income (1% of Part I, line 27b)</b>	<b>6</b>	<b>22,237.</b>
<b>7 Add lines 5 and 6</b>	<b>7</b>	<b>1,404,002.</b>
<b>8 Enter qualifying distributions from Part XII, line 4</b> 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.	<b>8</b>	<b>1,511,538.</b>

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> 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 <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1	22,237.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	22,237.
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	22,237.
6 Credits/Payments:			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	53,506.	
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	53,506.	
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	31,269.	
11 Enter the amount of line 10 to be: Credited to 2014 estimated tax <input checked="" type="checkbox"/> 31,269. Refunded <input type="checkbox"/>	11	0.	

**Part VII-A Statements Regarding Activities**

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. <input checked="" type="checkbox"/> \$ 0. (2) On foundation managers. <input checked="" type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input checked="" type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b 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? 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: • 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?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input checked="" type="checkbox"/> 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	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

**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		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>WWW.GUIDESTAR.ORG</u>	13	X	
14	The books are in care of ► <u>LAGERLOF, SENEAL, ET AL</u> Telephone no. ► <u>626-793-9400</u> Located at ► <u>301 N. LAKE AVENUE, SUITE 1000, PASADENA, CA</u> ZIP+4 ► <u>91101-5123</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year	15	N/A	
16	At any time during calendar year 2013, 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? See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ►	16	Yes	No
				X

**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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> 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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here ► <input type="checkbox"/>	1b	X
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?	1c	X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a	At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ►		
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) N/A	2b	
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ►		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
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 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 2013) N/A	3b	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?	4b	X

Form 990-PF (2013)

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

5a During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No

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

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

▶ ☐

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945-5(d).

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

6b

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

X

If "Yes" to 6b, file Form 8870.

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

7b

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

**Part VIII** Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
MICHAEL R. WHALEN	TRUSTEE			
531 S. MARENGO AVENUE	VARIABLE TO 10	138,966.	0.	0.
PASADENA, CA 91101-3114				
JOHN F. BRADLEY	TRUSTEE			
180 SOUTH LAKE AVENUE, SUITE 440	VARIABLE TO 10	138,966.	0.	0.
PASADENA, CA 91101				
TIMOTHY J. GOSNEY	TRUSTEE			
301 N. LAKE AVENUE, SUITE 1000	VARIABLE TO 10	138,966.	0.	0.
PASADENA, CA 91101-5123				

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

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

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

▶ 0





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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
<b>a</b>	Average monthly fair market value of securities	<b>1a</b>	46,602,423.
<b>b</b>	Average of monthly cash balances	<b>1b</b>	762,512.
<b>c</b>	Fair market value of all other assets	<b>1c</b>	2.
<b>d</b>	<b>Total</b> (add lines 1a, b, and c)	<b>1d</b>	47,364,937.
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	0.
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b>	0.
<b>3</b>	Subtract line 2 from line 1d	<b>3</b>	47,364,937.
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	<b>4</b>	710,474.
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	46,654,463.
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5	<b>6</b>	2,332,723.

**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.)

<b>1</b>	Minimum investment return from Part X, line 6	<b>1</b>	2,332,723.
<b>2a</b>	Tax on investment income for 2013 from Part VI, line 5	<b>2a</b>	22,237.
<b>b</b>	Income tax for 2013. (This does not include the tax from Part VI.)	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b	<b>2c</b>	22,237.
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1	<b>3</b>	2,310,486.
<b>4</b>	Recoveries of amounts treated as qualifying distributions	<b>4</b>	0.
<b>5</b>	Add lines 3 and 4	<b>5</b>	2,310,486.
<b>6</b>	Deduction from distributable amount (see instructions)	<b>6</b>	0.
<b>7</b>	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	<b>7</b>	2,310,486.

**Part XII****Qualifying Distributions** (see instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
<b>a</b>	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	<b>1a</b>	1,511,538.
<b>b</b>	Program-related investments - total from Part IX-B	<b>1b</b>	0.
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the:		
<b>a</b>	Suitability test (prior IRS approval required)	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule)	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	1,511,538.
<b>5</b>	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	<b>5</b>	22,237.
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	<b>6</b>	1,489,301.

**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 2012	(c) 2012	(d) 2013
<b>1</b> Distributable amount for 2013 from Part XI, line 7				2,310,486.
<b>2</b> Undistributed income, if any, as of the end of 2013				
<b>a</b> Enter amount for 2012 only			1,074,191.	
<b>b</b> Total for prior years:		0.		
<b>3</b> Excess distributions carryover, if any, to 2013:				
<b>a</b> From 2008				
<b>b</b> From 2009				
<b>c</b> From 2010				
<b>d</b> From 2011				
<b>e</b> From 2012				
<b>f</b> Total of lines 3a through e	0.			
<b>4</b> Qualifying distributions for 2013 from Part XII, line 4: ▶ \$ 1,511,538.				
<b>a</b> Applied to 2012, but not more than line 2a			1,074,191.	
<b>b</b> Applied to undistributed income of prior years (Election required - see instructions)		0.		
<b>c</b> Treated as distributions out of corpus (Election required - see instructions)	0.			
<b>d</b> Applied to 2013 distributable amount				437,347.
<b>e</b> Remaining amount distributed out of corpus	0.			
<b>5</b> Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	0.			
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b		0.		
<b>c</b> Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
<b>d</b> Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
<b>e</b> Undistributed income for 2012. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
<b>f</b> Undistributed income for 2013. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2014				1,873,139.
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
<b>8</b> Excess distributions carryover from 2008 not applied on line 5 or line 7	0.			
<b>9</b> Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	0.			
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2009				
<b>b</b> Excess from 2010				
<b>c</b> Excess from 2011				
<b>d</b> Excess from 2012				
<b>e</b> Excess from 2013				



**Part XV** Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution * *	Amount
Name and address (home or business)				
a Paid during the year				
HARVEY MUDD COLLEGE 301 PLATT BOULEVARD CLAREMONT, CA 91711	NONE	COLLEGE	SUMMER RESEARCH FELLOWSHIP IN CHEMISTRY	150,000.
CALIFORNIA LUTHERAN COLLEGE 60 WEST OLSEN ROAD THOUSAND OAKS, CA 91360-2787	NONE	COLLEGE	SUMMER RESEARCH PROGRAM IN CHEMISTRY	200,000.
METHODIST HOSPITAL OF SOUTHERN CALIFORNIA, ARCADIA 300 W. HUNTINGTON DRIVE ARCADIA, CA 91066-6016	NONE	HOSPITAL	PARTIALLY FUND COST OF PURCHASING, INSTALLING AND IMPLEMENTING A 160-SLICE CT SCANNER	250,000.
POMONA COLLEGE 550 N. COLLEGE AVENUE CLAREMONT, CA 91711	NONE	COLLEGE	SUMMER RESEARCH PROGRAM IN CHEMISTRY	85,000.
WESTMONT COLLEGE 955 LA PAZ ROAD SANTA BARBARA, CA 93108-1089	NONE	COLLEGE	SUMMER RESEARCH PROGRAM IN CHEMISTRY	80,000.
Total SEE CONTINUATION SHEET(S) ▶ 3a				1,260,700.
b Approved for future payment				
CALIFORNIA LUTHERAN COLLEGE 60 WEST OLSEN ROAD THOUSAND OAKS, CA 91360-2787	NONE	COLLEGE	1:1 CHALLENGE GRANT - ENDOWMENT FOR SUMMER RESEARCH PROGRAM IN CHEMISTRY	300,000.
CALIFORNIA INSTITUTE OF TECHNOLOGY 1200 E. CALIFORNIA BOULEVARD PASADENA, CA 91125	NONE	UNIVERSITY	1:1 MATCHING GRANT TO ESTABLISH JOHN STAUFFER ENDOWMENT OF SUMMER UNDERGRADUATE RESEARCH IN CHEMISTRY	1,000,000.
CLAREMONT MCKENNA COLLEGE 10TH & N. COLLEGE AVENUE CLAREMONT, CA 91711-6420	NONE	COLLEGE	1:1 CHALLENGE GRANT - ENDOWMENT FOR UNDERGRADUATE RESEARCH PROGRAM IN CHEMISTRY FOR STUDENTS IN THE	500,000.
Total SEE CONTINUATION SHEET(S) ▶ 3b				6,385,000.





FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES				STATEMENT	1
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	
DIVIDENDS AND INTEREST FROM SECURITIES	1,416,214.	33.	1,416,181.	1,416,181.		
TO PART I, LINE 4	1,416,214.	33.	1,416,181.	1,416,181.		

FORM 990-PF	LEGAL FEES				STATEMENT	2
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES		
LAGERLOF, SENEAL, GOSNEY & KRUSE, LLP	3,168.	2,407.			761.	
TO FM 990-PF, PG 1, LN 16A	3,168.	2,407.			761.	

FORM 990-PF	ACCOUNTING FEES				STATEMENT	3
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES		
MARTIN WERBELOW LLP	3,900.	3,510.			390.	
TO FORM 990-PF, PG 1, LN 16B	3,900.	3,510.			390.	

FORM 990-PF	OTHER PROFESSIONAL FEES			STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
EVERETT HARRIS & CO.	128,269.	128,269.			0.
TO FORM 990-PF, PG 1, LN 16C	128,269.	128,269.			0.

FORM 990-PF	TAXES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FRANCHISE TAX BOARD	10.	5.			5.
FOREIGN TAXES	32,239.	32,239.			0.
CA ATTORNEY GENERAL	75.	38.			37.
FEDERAL TAX ESTIMATES	50,000.	50,000.			0.
TO FORM 990-PF, PG 1, LN 18	82,324.	82,282.			42.

FORM 990-PF	OTHER EXPENSES			STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
AMORTIZATION	118,362.	118,362.			0.
ADR PASS THRU FEES	1,391.	1,391.			0.
FILING FEE	435.	435.			0.
LIABILITY INSURANCE	1,112.	1,112.			0.
TO FORM 990-PF, PG 1, LN 23	121,300.	121,300.			0.



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FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS	STATEMENT	7
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DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
US TREASURY NOTE 4.0% DUE 2/15/14	X		599,721.	602,813.
US TREASURY NOTE 5.125% DUE 5/15/16	X		249,787.	277,031.
US TREASURY NOTE 4.25% DUE 8/15/15	X		597,068.	638,344.
US TREASURY NOTE 4.5% DUE 2/15/16	X		223,888.	244,441.
US TREASURY NOTE 4.25% DUE 11/15/13	X		0.	0.
FED HOME LOAN BANKS 5.25% DUE 9/13/13	X		0.	0.
FEDERAL FARM CREDIT BANK NOTES 2.6% DUE 02/19/13	X		0.	0.
FED HOME LOAN BANK NOTES 2.93% DUE 03/11/14	X		500,170.	502,617.
US TREASURY NOTE 7.25% DUE 05/15/16	X		298,395.	329,977.
FEDERAL HOME LOAN BANK NOTES 3.125% DUE 12/13/13	X		0.	0.
CALIFORNIA STATE GO 4.85% DUE 10/01/14		X	250,477.	257,593.
FEDERAL FARM CREDIT BANK NOTES 2.9% DUE 1/5/15	X		499,840.	513,627.
FEDERAL HOME LOAN BANK NOTES 1.5% DUE 1/16/13	X		0.	0.
FEDERAL HOME LOAN BANK NOTES 3.125% DUE 7/7/14	X		500,002.	507,630.
TOTAL U.S. GOVERNMENT OBLIGATIONS			3,468,871.	3,616,480.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS			250,477.	257,593.
TOTAL TO FORM 990-PF, PART II, LINE 10A			3,719,348.	3,874,073.

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FORM 990-PF	CORPORATE STOCK	STATEMENT	8
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
ABBOTT LABORATORIES	199,273.	344,970.
GENERAL ELECTRIC CO.	733,419.	1,121,200.
GOOGLE, INC.	559,555.	1,793,136.
JOHNSON & JOHNSON	636,336.	1,190,670.
PEPSICO, INC.	730,238.	1,078,220.
PROCTOR & GAMBLE CO.	391,824.	569,870.
UNITED PARCEL SERVICE CLASS B	797,617.	1,155,880.
MICROSOFT CORP	588,896.	785,610.
WAL-MART STORES, INC.	947,721.	1,652,490.
APPLE INC.	219,531.	1,178,142.

BAXTER INTERNATIONAL	479,471.	695,500.
COSTCO WHOLESALE CORP	504,701.	1,190,200.
MCDONALDS CORP	807,348.	1,649,510.
1/100 BERKSHIRE HATHAWAY	1,064,044.	1,601,100.
CHEVRON CORP	685,147.	999,280.
CONOCOPHILLIPS	778,427.	1,059,750.
NESTLE	1,039,078.	1,839,750.
NOVO-NORDISK A-S ADR F	283,277.	1,016,180.
UNILEVER N V NY SHS	806,584.	1,030,000.
VODAFONE GROUP NEW ADR F	752,427.	1,081,025.
WAL-MART DE MEX SAB ADRF	0.	0.
YUM BRANDS INC	0.	0.
SPDR GOLD TRUST	362,206.	464,480.
CHINA MOBILE LTD	946,614.	993,510.
ZIMMER HOLDINGS	640,642.	1,025,090.
COLGATE-PALMOLIVE	389,130.	652,100.
LAB CP OF AMERICA HLDG NEW	558,107.	639,590.
NOVARTIS AG	487,808.	704,772.
SYSCO CORPORATION	590,599.	722,000.
TARGET CORPORATION	244,907.	316,350.
TEMPLETON GLOBAL INCM FD	104,992.	79,500.
NIKE INC CLASS B	527,453.	943,680.
PHLLIPS 66	231,337.	578,475.
WALT DISNEY CO.	298,471.	764,000.
IBM	811,764.	750,280.
QUALCOMM INC.	372,626.	497,475.
ABBVIE INC.	216,094.	475,290.
LINDT & SPRUENGLI AG	359,125.	453,633.
TOTAL TO FORM 990-PF, PART II, LINE 10B	20,146,789.	33,092,708.

FORM 990-PF	CORPORATE BONDS	STATEMENT	9
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
BELLSOUTH CORP. 5.2% DUE 12/15/16	179,946.	199,124.
MORGAN STANLEY CO. 5.3% DUE 3/1/13	0.	0.
BERKSHIRE HATHAWAY FIN NOTES 5.00% DUE 08/15/13	0.	0.
GENERAL ELECTRIC CAP. CORP. 4.8% DUE 05/01/13	0.	0.
GENERAL MILLS 5.25% DUE 08/15/13	0.	0.
COMCAST CORP. NEW 6.5% DUE 01/15/15	252,253.	265,205.
AES CORP 8% DUE 10/15/17	262,242.	295,000.
BRINKER INT'L 5.75% DUE 6/1/14	0.	0.
CAMPBELL SOUP 3.375% DUE 8/15/14	201,766.	203,736.
COMCAST 4.95% DUE 6/15/16	261,667.	273,095.
ENTERPRISE PRODS 3.2% DUE 2/1/16	250,137.	261,422.
PITNEY BOWES 4.875% DUE 8/15/14	0.	0.
SARA LEE 2.75% DUE 9/15/15	251,444.	256,821.
VODAFONE GROUP 4.15% DUE 6/10/14	251,904.	253,982.
YUM BRANDS 3.875% DUE 11/1/20	242,681.	252,304.

AMERICAN INTERNATIONAL GROUP 4.25 DUE 09/15/14	249,690.	256,475.
AMGEN INC 2.3% DUE 06/15/15	247,894.	257,914.
AMGEN INC 3.875 DUE 11/15/21	247,896.	256,556.
BANK OF AMERICA NOTES 6.25% DUE 05/15/16	304,566.	330,575.
ENERGY TRANSFER NOTES 6% DUE 07/01/13	0.	0.
HOST HOTELS RESORT BONDS 6.75% DUE 06/01/16	75,483.	75,017.
ENERGIZER HOLDING 4.7% DUE 05/19/21	264,425.	252,312.
FORD MOTOR CREDIT NOTES 5.0% DUE 05/15/18	263,099.	277,653.
FRESENIUS MEDIC NOTES 6.875% DUE 07/15/17	559,237.	563,162.
GENERAL ELECTRIC CAP FLT PERP BONDS DUE PERP BONDS DUE PERP MTY	511,533.	510,438.
INT'L LEASE FIN NOTES 5.75% DUE 05/15/16	259,436.	268,125.
LABORATORY CORP O NOTES 2.2% DUE 08/23/17	508,088.	502,494.
LEUCADIA NAT'L CORP SR NOTES 7.0% DUE 08/15/13	0.	0.
SAFEWAY INC NOTES 6.25% DUE 03/15/14	0.	0.
SPRINT NEXTEL CORP 6.0% DUE 12/1/16	534,201.	545,000.
WACHOVIA CAP FLT 1976 NOTES DUE PERP MTY	479,259.	460,000.
ADT CORP 2.25% DUE 7/15/17	243,158.	245,000.
BAIDU INC 3.25% DUE 8/6/18	515,818.	504,112.
BANK OF AMERICA NOTES VAR 33 DUE 7/11/33	500,025.	500,000.
COUNTRYWIDE NOTES (B OF A NOTES) 6.25% DUE 5/15/16	217,488.	220,383.
ECHOSTAR (DISH) DBS CORP 6.625% DUE 10/1/14	517,566.	518,750.
KELLOGG COMPANY 1.75% DUE 5/17/17	253,333.	250,027.
OWENS CORNING 6.5% DUE 12/1/16	247,691.	249,478.
PETROBRAS INT'L 3.5% DUE 2/6/17	301,677.	303,162.
SAFEWAY INC NOTES 5% DUE 8/15/19	534,634.	531,518.
VERIZON COMM 3.65% DUE 9/14/18	531,471.	529,302.
VODAFONE GROUP 1.25% DUE 9/26/17	482,499.	486,907.
WATSON PHARMACEUTICALS (ACTAVIS INC) 1.875% DUE 10/1/17	249,014.	248,552.
TOTAL TO FORM 990-PF, PART II, LINE 10C	11,253,221.	11,403,601.

FORM 990-PF	MORTGAGE LOANS	STATEMENT 10
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
GNMA 8.00% DUE 10/15/24	78.	80.
FNMA 7.50% DUE 10/1/24	2,881.	3,263.
GNMA II 6.00% DUE 12/20/28	15,238.	17,056.
FNMA 7.00% DUE 4/1/31	1,660.	1,900.
FNMA 6.5% DUE 6/1/16	1,880.	1,935.
TOTAL TO FORM 990-PF, PART II, LINE 12	21,737.	24,234.

FORM 990-PF	OTHER ASSETS		STATEMENT 11
DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
MINERAL RIGHTS	2.	2.	2.
PREPAID INTEREST	36,736.	56,400.	56,400.
TO FORM 990-PF, PART II, LINE 15	36,738.	56,402.	56,402.

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION  
PART XV, LINES 2A THROUGH 2D

STATEMENT 12

## NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

TIMOTHY GOSNEY  
301 N. LAKE AVENUE, SUITE 1000  
PASADENA, CA 91101-5123

## TELEPHONE NUMBER

626-793-9400

## EMAIL ADDRESS

TGOSNEY@LAGERLOF.COM

## FORM AND CONTENT OF APPLICATIONS

A LETTER STATING THE PURPOSE OF THE APPLICATION AND AMOUNT, TAX EXEMPT  
STATUS FROM IRS AND STATE AUTHORITIES AND IRS PRIVATE FOUNDATION RULING.  
GUIDELINES ARE AVAILABLE UPON REQUEST.

## ANY SUBMISSION DEADLINES

NONE

## RESTRICTIONS AND LIMITATIONS ON AWARDS

AWARDS MADE TO HOSPITALS, COLLEGES AND UNIVERSITIES IN CALIFORNIA.

# Application for Extension of Time To File an Exempt Organization Return

OMB No. 1545-1709

► File a separate application for each return.

► Information about Form 8868 and its instructions is at [www.irs.gov/form8868](http://www.irs.gov/form8868).

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form).

**Do not complete Part II unless** you have already been granted an automatic 3-month extension on a previously filed Form 8868.

**Electronic filing (e-file).** You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit [www.irs.gov/efile](http://www.irs.gov/efile) and click on *e-file for Charities & Nonprofits*.

## **Part I Automatic 3-Month Extension of Time.** Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete

Part I only ☐

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

Type or print  File by the due date for filing your return. See instructions.	Name of exempt organization or other filer, see instructions.	Enter filer's identifying number Employer identification number (EIN) or
	JOHN STAUFFER CHARITABLE TRUST	23-7434707
	Number, street, and room or suite no. If a P.O. box, see instructions 301 N. LAKE AVE., SUITE 1000	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions PASADENA, CA 91101-5123	

Enter the Return code for the return that this application is for (file a separate application for each return)

**04**

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720 (other than individual)	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

**LAGERLOF, SENEAL, ET AL**

- The books are in the care of ► **301 N. LAKE AVENUE, SUITE 1000 - PASADENA, CA 91101-5123**  
Telephone No ► **626-793-9400** Fax No ► **626-793-5900**

- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ☐. If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for

- 1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until **AUGUST 15, 2014**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:  
► ☒ calendar year **2013** or  
► ☐ tax year beginning \_\_\_\_\_, and ending \_\_\_\_\_

- 2 If the tax year entered in line 1 is for less than 12 months, check reason ☐ Initial return ☐ Final return  
☐ Change in accounting period

3a If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	44,082.
b If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$	53,506.
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$	0.

**Caution.** If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

**Part XV** Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
GLENDALE ADVENTIST 1509 WILSON TERRACE GLENDALE, CA 91206	NONE	HOSPITAL	FUNDING FOR MOBILE MEDICAL CLINIC	495,700.
<b>Total from continuation sheets</b>				495,700.

**Part XV Supplementary Information****3 Grants and Contributions Approved for Future Payment (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
METHODIST HOSPITAL OF SOUTHERN CALIFORNIA, ARCADIA 300 W. HUNTINGTON DRIVE ARCADIA, CA 91066-6016	NONE	HOSPITAL	PARTIALLY FUND COST OF PURCHASING, INSTALLING AND IMPLEMENTING A 160-SLICE CT SCANNER	250,000.
PEPPERDINE UNIVERSITY 24255 PACIFIC COAST HIGHWAY MALIBU, CA 90265	NONE	UNIVERSITY	1:1 MATCHING GRANT FOR ENDOWMENT SUPPORTING PERMANENT UNDERGRADUATE RESEARCH PROGRAM FOR CHEMISTRY	1,000,000.
POMONA COLLEGE 550 N. COLLEGE AVENUE CLAREMONT, CA 91711	NONE	COLLEGE	1:2 CHALLENGE GRANT - ENDOWMENT FOR SUMMER RESEARCH PROGRAM IN CHEMISTRY	415,000.
SCRIPPS COLLEGE 1030 COLUMBIA AVENUE CLAREMONT, CA 91711-3948	NONE	COLLEGE	1:1 CHALLENGE GRANT - ENDOWMENT FOR SUMMER RESEARCH PROGRAM IN CHEMISTRY	500,000.
UNIVERSITY OF CALIFORNIA, BERKELEY 420 LATIMER HALL BERKELEY, CA 94720-1460	NONE	UNIVERSITY	1:2 CHALLENGE MATCHING GRANT TO FUND ENDOWMENT FOR UNDERGRADUATE SUMMER SCIENCE RESEARCH IN	500,000.
UNIVERSITY OF PACIFIC 3601 PACIFIC AVENUE STOCKTON, CA 95211	NONE	UNIVERSITY	1:1 MATCHING GRANT TO ESTABLISH UNDERGRADUATE RESEARCH ENDOWMENT IN CHEMISTRY AND BIOCHEMISTRY	500,000.
UNIVERSITY OF REDLANDS P.O. BOX 3080 REDLANDS, CA 92373-0999	NONE	UNIVERSITY	1:2 LEAD GRANT TO CREATE RESEARCH ENDOWMENT FOR SUMMER RESEARCH PROGRAM	1,000,000.
WESTMONT COLLEGE 955 LA PAZ ROAD SANTA BARBARA, CA 93108-1089	NONE	COLLEGE	CHALLENGE GRANT FOR ENDOWMENT OF SUMMER RESEARCH PROGRAM IN CHEMISTRY	420,000.
<b>Total from continuation sheets</b>				<b>4,585,000.</b>



**Part XV** | **Supplementary Information**

3b Grants and Contributions Approved for Future Payment Continuation of Purpose of Grant or Contribution

NAME OF RECIPIENT - CALIFORNIA INSTITUTE OF TECHNOLOGY

1:1 MATCHING GRANT TO ESTABLISH JOHN STAUFFER ENDOWMENT OF SUMMER  
UNDERGRADUATE RESEARCH IN CHEMISTRY AND CHEMICAL ENGINEERING

NAME OF RECIPIENT - CLAREMONT MCKENNA COLLEGE

1:1 CHALLENGE GRANT - ENDOWMENT FOR UNDERGRADUATE RESEARCH PROGRAM IN  
CHEMISTRY FOR STUDENTS IN THE W.M. KECK SCIENCE DEPARTMENT.

NAME OF RECIPIENT - PEPPERDINE UNIVERSITY

1:1 MATCHING GRANT FOR ENDOWMENT SUPPORTING PERMANENT UNDERGRADUATE  
RESEARCH PROGRAM FOR CHEMISTRY MAJORS

NAME OF RECIPIENT - UNIVERSITY OF CALIFORNIA, BERKELEY

1:2 CHALLENGE MATCHING GRANT TO FUND ENDOWMENT FOR UNDERGRADUATE SUMMER  
SCIENCE RESEARCH IN CHEMISTRY