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## Return of Private Foundation

OMB No 1545-0052

Department of the Treasury  
Internal Revenue Service

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>The William and Ann Murphy Family Charitable Foundation</b>		A Employer identification number <b>26-6087128</b>
Number and street (or P.O. box number if mail is not delivered to street address) <b>3807 Toro Canyon Road #2</b>	Room/suite	B Telephone number <b>512-306-1010</b>
City or town, state or province, country, and ZIP or foreign postal code <b>Austin, TX 78746</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>\$ 763,396.</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		15.	15.		Statement 1
4 Dividends and interest from securities		18,835.	18,835.		Statement 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		97,179.			
b Gross sales price for all assets on line 6a					
7 Capital gain net income (from Part IV, line 2)			97,179.		
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		116,029.	116,029.		
13 Compensation of officers, directors, trustees, etc		0.	0.		0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees Stmt 3		2,018.	2,018.		0.
c Other professional fees Stmt 4		2,798.	2,798.		0.
17 Interest					
18 Taxes Stmt 5		412.	412.		0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses Stmt 6		178.	178.		0.
24 Total operating and administrative expenses. Add lines 13 through 23		5,406.	5,406.		0.
25 Contributions, gifts, grants paid		35,357.			35,357.
26 Total expenses and disbursements. Add lines 24 and 25		40,763.	5,406.		35,357.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		75,266.			
b Net investment income (if negative, enter -0-)			110,623.		
c Adjusted net income (if negative, enter -0-)				N/A	

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<b>Part II Balance Sheets</b> <small>Attached schedules and amounts in the description column should be for end-of-year amounts only</small>		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	2,421.	9,312.	9,312.
	3 Accounts receivable <span style="float:right">1,988.</span>			
	Less: allowance for doubtful accounts		1,988.	1,988.
	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			
	b Investments - corporate stock <span style="float:right">Stmt 7</span>	562,559.	627,458.	752,096.
	c Investments - corporate bonds			
	11 Investments - land, buildings, and equipment basis			
Less: accumulated depreciation				
12 Investments - mortgage loans				
13 Investments - other				
14 Land, buildings, and equipment basis				
Less: accumulated depreciation				
15 Other assets (describe)				
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item 1)	564,980.	638,758.	763,396.	
<b>Liabilities</b>	17 Accounts payable and accrued expenses	1,488.		
	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 Total liabilities (add lines 17 through 22)	1,488.	0.	
<b>Net Assets or Fund Balances</b>	Foundations that follow SFAS 117, check here <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	589,138.	589,138.	
	28 Paid-in or capital surplus, or land, bldg, and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	-25,646.	49,620.	
	30 Total net assets or fund balances	563,492.	638,758.	
	31 Total liabilities and net assets/fund balances	564,980.	638,758.	

**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	563,492.
2 Enter amount from Part I, line 27a	2	75,266.
3 Other increases not included in line 2 (itemize)	3	0.
4 Add lines 1, 2, and 3	4	638,758.
5 Decreases not included in line 2 (itemize)	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	638,758.

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**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a Fidelity (see attached)		Various	Various
b Fidelity (see attached)		Various	Various
c Fidelity (see attached)		Various	Various
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			-5,117.
b			102,452.
c			-156.
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			-5,117.
b			102,452.
c			-156.
d			
e			

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	97,179.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8	{ }	3	N/A

**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	37,550.	671,246.	.055941
2011	24,750.	607,273.	.040756
2010	17,359.	540,849.	.032096
2009	2,351.	480,924.	.004889
2008	22,369.	410,121.	.054542

2 Total of line 1, column (d)	2	.188224
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	.037645
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	732,715.
5 Multiply line 4 by line 3	5	27,583.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	1,106.
7 Add lines 5 and 6	7	28,689.
8 Enter qualifying distributions from Part XII, line 4	8	35,357.

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.

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**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	1,106.
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	1,106.
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	1,106.
6 Credits/Payments:			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a		
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7		0.
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8		9.
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		1,115.
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 <input type="checkbox"/> Refunded <input checked="" type="checkbox"/>	11		

**Part VII-A Statements Regarding Activities**

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b 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 type="checkbox"/> \$ 0. (2) On foundation managers. <input 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 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 type="checkbox"/> NH		
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

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**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>none</u>	13	X	
14	The books are in care of ► <u>William and Ann Murphy</u> Telephone no. ► <u>512-306-1010</u> Located at ► <u>3807 Toro Canyon Road #2, Austin, TX</u> ZIP+4 ► <u>78746</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 type="checkbox"/> Yes <input checked="" 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	N/A	1b
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
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? If "Yes," list the years ►	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
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
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

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**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?

If "Yes" to 6b, file Form 8870

☐ Yes ☒ No

7b

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

N/A

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

**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
Ann E. Murphy	Trustee			
3807 Toro Canyon Road #2				
Austin, TX 78746	5.00	0.	0.	0.
William J. Murphy	Trustee			
3807 Toro Canyon Road #2				
Austin, TX 78746	5.00	0.	0.	0.

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

**3 Five highest-paid independent contractors for professional services. If none, enter "NONE."**

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

<b>Total</b> number of others receiving over \$50,000 for professional services	0
---	---

Total number of orders receiving over \$500 for professional services	
Part IX-A	Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.		Expenses
1	N/A	
2		
3		
4		

## Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.		Amount
1	N/A	
2		
All other program-related investments. See instructions.		
3		
Total. Add lines 1 through 3		0.

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**The William and Ann Murphy Family  
Charitable Foundation**

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:	
a	Average monthly fair market value of securities	609,771.
b	Average of monthly cash balances	134,102.
c	Fair market value of all other assets	
d	Total (add lines 1a, b, and c)	743,873.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	0.
2	Acquisition indebtedness applicable to line 1 assets	0.
3	Subtract line 2 from line 1d	743,873.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	11,158.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	732,715.
6	Minimum investment return. Enter 5% of line 5	36,636.

**Part XI****Distributable Amount** (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6	36,636.
2a	Tax on investment income for 2013 from Part VI, line 5	1,106.
b	Income tax for 2013. (This does not include the tax from Part VI.)	
c	Add lines 2a and 2b	1,106.
3	Distributable amount before adjustments. Subtract line 2c from line 1	35,530.
4	Recoveries of amounts treated as qualifying distributions	0.
5	Add lines 3 and 4	35,530.
6	Deduction from distributable amount (see instructions)	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	35,530.

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

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:	
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	35,357.
b	Program-related investments - total from Part IX-B	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	
3	Amounts set aside for specific charitable projects that satisfy the:	
a	Suitability test (prior IRS approval required)	
b	Cash distribution test (attach the required schedule)	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	35,357.
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	1,106.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	34,251.

**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
1 Distributable amount for 2013 from Part XI, line 7				35,530.
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only			27,846.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2013.				
a From 2008				
b From 2009				
c From 2010				
d From 2011				
e From 2012				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2013 from Part XII, line 4: ▶ \$ 35,357.				
a Applied to 2012, but not more than line 2a			27,846.	
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.			
d Applied to 2013 distributable amount				7,511.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:	0.			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2012. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2013. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2014				28,019.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2009				
b Excess from 2010				
c Excess from 2011				
d Excess from 2012				
e Excess from 2013				



The William and Ann Murphy Family  
Charitable Foundation

Form 990-PF (2013)

26-6087128 Page 11

**Part XV** Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>a Paid during the year</b>				
St. Joseph's Parenting Center 566 Elm Street Stamford, CT 06902-5116	none	approved 501(c)(3)	unrestricted gift	3,500.
Fordham Preparatory School E. Fordham Road Bronx, NY 10458	none	approved 501(c)(3)	unrestricted gift	3,000.
Dominican Academy 44 East 68th Street New York, NY 10065	none	approved 501(c)(3)	unrestricted gift	2,500.
Seton Cove 3708 Crawford Street Austin, TX 78731	none	approved 501(c)(3)	unrestricted gift	1,000.
Pug Rescue of New England 37 Woodlawn Street Dedham, MA 02026	none	approved 501(c)(3)	unrestricted gift	250.
<b>Total</b>	<b>See continuation sheet(s)</b>			<b>35,357.</b>
<b>b Approved for future payment</b>				
None				
<b>Total</b>				<b>0.</b>





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Form 990-PF Interest on Savings and Temporary Cash Investments Statement 1

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Source	Amount
Fidelity Interest	15.
Total to Form 990-PF, Part I, line 3, Column A	15.

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Form 990-PF Dividends and Interest from Securities Statement 2

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Source	Gross Amount	Capital Gains Dividends	Column (A) Amount
Fidelity	18,835.	0.	18,835.
Total to Fm 990-PF, Part I, ln 4	18,835.	0.	18,835.

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Form 990-PF Accounting Fees Statement 3

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Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
legal and accounting	2,018.	2,018.		0.
To Form 990-PF, Pg 1, ln 16b	2,018.	2,018.		0.

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Form 990-PF Other Professional Fees Statement 4

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Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Financial advisor fees	2,798.	2,798.		0.
To Form 990-PF, Pg 1, ln 16c	2,798.	2,798.		0.

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Form 990-PF	Taxes	Statement	5
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Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
2012 federal income tax	412.	412.		0.
To Form 990-PF, Pg 1, ln 18	412.	412.		0.

Form 990-PF	Other Expenses	Statement	6
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Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
NH Filing Fee	75.	75.		0.
Advisor Check Fee Surcharge	103.	103.		0.
To Form 990-PF, Pg 1, ln 23	178.	178.		0.

Form 990-PF	Corporate Stock	Statement	7
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Description	Book Value	Fair Market Value
Fidelity Account-common stock (see attached)	627,458.	752,096.
Total to Form 990-PF, Part II, line 10b	627,458.	752,096.

Form 990-PF	Part XV - Line 1a List of Foundation Managers	Statement	8
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## Name of Manager

Ann E. Murphy  
William J. Murphy





# 2013 TAX REPORTING STATEMENT

WILLIAM/ANN MURPHY FMLY FDN TN  
Account No 678-229431 Customer Service 781-547-8660  
Recipient ID No 26-6087128 Payer's Fed ID Number 04-3523567

## FORM 1099-B\* 2013 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient OMB NO 1545-0715

Short-term transactions for which basis is reported to the IRS --report on Form 8949 with Box A checked and/or Schedule D, Part I  
(This Label is a Substitute for Boxes 1c & 6)

(IRS Form 1099-B box numbers are shown below in bold type)

8 Description, 1d Stock or Other Symbol, CUSIP									
Action	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc (a)	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale Loss Disallowed	4 Federal Income Tax Withheld	13 State Tax Withheld
ABBOTT LABORATORIES, ABT, 002824100									
Sale	07/03/13	05/13/13	165 000	5,588 45	5,954 85	-366 40			
ALTRIA GROUP INC, MO, 02209S103									
Sale	08/21/13	05/13/13	190 000	6,409 52	6,973 00	-563 48			
EXXON MOBIL CORP, XOM, 30231G102									
Sale	10/02/13	05/13/13	210 000	17,923 18	18,858 00	-934 82			
GENERAL MILLS INC, GIS, 370334104									
Sale	09/30/13	05/20/13	203 000	9,672 86	9,992 68	-319 82			
HOME DEPOT INC, HD, 437076102									
Sale	08/23/13	05/20/13	130 000	9,506 57	9,977 05	-470 48			
INTEL CORP, INTC, 458140100									
Sale	07/08/13	05/13/13	325 000	7,514 06	7,933 25	-419 19			
INTL BUSINESS MACH, IBM, 459200101									
Sale	08/19/13	05/13/13	10 000	1,846 11	2,043 40	-197 29			
LILLY ELI & CO, LLY, 532457108									
Sale	09/26/13	05/20/13	182 000	9,251 64	10,007 54	-755 90			
MICROSOFT CORP, MSFT, 594918104									
Sale	07/19/13	05/13/13	245 000	7,899 92	7,982 10	-82 18			

\* This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

01/14/2014 9002146061

T90011HC4016208 001970 0001/0009 00





# 2013 TAX REPORTING STATEMENT

WILLIAM/ANN MURPHY FMLY FDNTN  
Account No 678-229431 Customer Service. 781-547-8660  
Recipient ID No 26-6087128 Payer's Fed ID Number 04-3523567

## FORM 1099-B\* 2013 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient OMB NO. 1545-0715

Short-term transactions for which basis is reported to the IRS --report on Form 8949 with Box A checked and/or Schedule D, Part I  
(This Label is a Substitute for Boxes 1c & 6)

(IRS Form 1099-B box numbers are shown below in bold type)

8 Description, 1d Stock or Other Symbol, CUSIP							
Action	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc (a)	3 Cost or Other Basis (b)	5 Wash Sale Loss Disallowed	15 State Tax Withheld
VERIZON COMMUNICATIONS, VZ, 92343V104							
Sale	08/22/13	05/13/13	170 000	7,976 85	8,984 50	-1,007 65	
TOTALS				83,589.16	88,706.37	0.00	
Box A Short-Term Realized Gain				0.00			
Box A Short-Term Realized Loss				-5,117.21			
Box A Wash Sale Loss Disallowed						0.00	

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# 2013 TAX REPORTING STATEMENT

WILLIAM/ANN MURPHY FAMILY FDN TN  
Account No 678-229431 Customer Service 781-547-8660  
Recipient ID No 26-6087128 Payer's Fed ID Number 04-3523567

## FORM 1099-B

## 2013 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient: OMB NO: 1545-0715

Long-term transactions for which basis is not reported to the IRS -- report on Form 8949 with Box B checked and/or Schedule D, Part II

(This Label is a Substitute for Boxes 1c & 6)

(IRS Form 1099-B box numbers are shown below in bold type)

8 Description, 1d Stock or Other Symbol, CUSIP		1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc (a)	3 Cost or Other Basis (b)	5 Wash Sale Disallowed Loss	4 Federal Income Tax Withheld	13 State Tax Withheld
Action	1a Date of Sale or Exchange	1b Date of Acquisition			Gain/Loss (-)		
ABBOTT LABORATORIES, ABT, 002824100							
Sale	07/03/13	05/13/10	405 000	13,717 11	9,535 89	4,181 22	
ALTRIA GROUP INC, MO, 02209S103							
Sale	08/21/13	05/13/10	920 000	31,035 56	20,123 87	10,911 69	
COLGATE-PALMOLIVE CO, CL, 194162103							
Sale	03/27/13	02/12/08	128 000	14,937 63	9,956 15	4,981 48	
Sale	03/27/13	02/22/08	65 000	7,585 52	5,037 27	2,548 25	
Sale	03/27/13	03/14/08	65 000	7,585 52	5,066 83	2,518 69	
Sale	03/27/13	01/11/10	110 000	12,837 03	9,081 63	3,755 40	
Subtotals				<b>42,945.70</b>	<b>29,141.88</b>		
EXXON MOBIL CORP, XOM, 30231G102							
Sale	10/02/13	02/22/08	6 000	512 09	533 17	-21 08	
Sale	10/02/13	03/14/08	55 000	4,694 17	4,829 58	-135 41	
Sale	10/02/13	01/11/10	70 000	5,974 40	5,001 53	972 87	
Subtotals				<b>11,180.66</b>	<b>10,364.28</b>		
HEINZ H J CO *CASH PAYMENT AT \$72.50 PER, 423074103							
Merger	06/10/13	05/13/10	420 000	30,450 00	19,955 84 (f)	10,494 16	
INTEL CORP, INTC, 458140100							
Sale	07/08/13	02/12/08	485 000	10,750 89	9,824 65	926 24	
Sale	07/08/13	02/22/08	245 000	5,664 45	4,970 09	694 36	
Sale	07/08/13	03/14/08	230 000	5,317 65	4,879 91	437 74	

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# 2013 TAX REPORTING STATEMENT

WILLIAM/ANN MURPHY FMLY FDN TN

Account No 678-229431 Customer Service 781-547-8660

Recipient ID No 26-6087128 Payer's Fed ID Number 04-3523567

## FORM 1099-B\* 2013 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient OMB NO 1545-0715

Long-term transactions for which basis is not reported to the IRS --report on Form 8949 with Box B checked and/or Schedule D, Part II

(This Label is a Substitute for Boxes 1c & 6)

(IRS Form 1099-B box numbers are shown below in bold type)

8 Description, 1d Stock or Other Symbol, CUSIP		1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc. (a)	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale Loss Disallowed	4 Federal Income Tax Withheld	13 State Tax Withheld	15 State Tax Withheld
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INTEL CORP, INTC, 458140100

### Subtotals

21,732.99 19,674.65

INTL BUSINESS MACH, IBM, 459200101

Sale	08/19/13	02/12/08	95 000	17,538 06	10,196 73	7,341 33
Sale	08/19/13	02/22/08	45 000	8,307 50	4,902 63	3,404 87
Sale	08/19/13	03/14/08	40 000	7,384 45	4,716 98	2,667 47
Sale	08/19/13	01/11/10	55 000	10,153 62	7,304 53	2,849 09

### Subtotals

43,383.63 27,120.87

JPMORGAN CHASE & CO, JPM, 46625H100

Sale	03/27/13	03/24/08	210 000	10,038 40	9,715 95	322 45
Sale	03/27/13	03/25/08	205 000	9,799 39	9,735 74	63 65
Sale	03/27/13	01/11/10	265 000	12,667 52	12,151 51	516 01

### Subtotals

32,505.31 31,603.20

MICROSOFT CORP, MSFT, 594918104

Sale	07/19/13	02/12/08	345 000	11,124 36	9,919 62	1,204 74
Sale	07/19/13	02/22/08	175 000	5,642 79	4,953 88	688 91
Sale	07/19/13	03/14/08	175 000	5,642 79	5,001 12	641 67
Sale	07/19/13	01/11/10	290 000	9,350 91	9,091 28	259 63

### Subtotals

31,760.85 28,965.90

PHILIP MORRIS INTL INC COM, PM, 718172109

Sale	03/27/13	01/11/10	395 000	36,321 92	19,876 67	16,445 25
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# 2013 TAX REPORTING STATEMENT

WILLIAM/ANN MURPHY FAMILY FDN TN Account No 678-229431 Customer Service 781-547-8660  
Recipient ID No 26-6087128 Payer's Fed ID Number 04-3523567

## FORM 1099-B\*

### 2013 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient: OMB NO 1545-0715

Long-term transactions for which basis is not reported to the IRS --report on Form 8949 with Box B checked and/or Schedule D, Part II

(This Label is a Substitute for Boxes 1c & 6)

(IRS Form 1099-B box numbers are shown below in bold type)

8 Description, 1d Stock or Other Symbol, CUSIP		1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc. (a)	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale Loss Disallowed	4 Federal Income Tax Withheld	13 State Tax Withheld	15 State Tax Withheld
PROCTER & GAMBLE CO, PG, 742718109									
Sale	03/27/13	02/12/08	146 000	11,224 62	9,967 46	1,257 16			
Sale	03/27/13	02/22/08	75 000	5,766 07	5,062 37	703 70			
Sale	03/27/13	03/14/08	70 000	5,381 67	4,780 98	600 69			
Sale	03/27/13	01/11/10	130 000	9,994 53	7,972 12	2,022 41			
Subtotals				<b>32,366.89</b>	<b>27,782.93</b>				
UNITED TECHNOLOGIES CORP, UTX, 913017109									
Sale	03/27/13	02/12/08	134 000	12,343 30	9,939 11	2,404 19			
Sale	03/27/13	02/22/08	65 000	5,987 42	4,739 57	1,247 85			
Sale	03/27/13	03/14/08	70 000	6,447 99	4,858 68	1,589 31			
Sale	03/27/13	01/11/10	100 000	9,211 43	7,202 03	2,009 40			
Subtotals				<b>33,990.14</b>	<b>26,739.39</b>				
VERIZON COMMUNICATIONS, VZ, 92343V104									
Sale	08/22/13	06/08/09	605 000	28,388 22	16,598 35	11,789 87			
TOTALS				<b>389,778.98</b>	<b>287,483.72</b>				
			Box B Long-Term Realized Gain			102,451.75			
			Box B Long-Term Realized Loss			-156.49			
			Box B Wash Sale Loss Disallowed				0.00		

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The William and Ann Murphy Family  
Charitable Foundation

26-6087128

**Part XV** · Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)				
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)				
New England MG Walk (for Myasthenia Gravis Foundation) 355 Lexington Avenue, 15th FL New York, NY 10017	none	approved 501(c)(3)	unrestricted gift	500.
Pug Rescue of New England 37 Woodlawn Street Dedham, MA 02026	none	approved 501(c)(3)	unrestricted gift	500.
The Dwelling Place of N.Y., Inc. 409 West 40th Street New York, NY 10018	none	approved 501(c)(3)	unrestricted gift	500.
St. Anthony's Shrine and Ministry 100 Arch Street Boston, MA 02110	none	approved 501(c)(3)	unrestricted gift	500.
Boston College 140 Commonwealth Avenue Chestnut Hill, MA 02467	none	approved 501(c)(3)	unrestricted gift	12,107.
St. Sebastians Preporatory School 1191 Greendale Avenue Needham, MA 02492	none	approved 501(c)(3)	unrestricted gift	10,000.
St. Ignastius Martyr Catholic School 120 West Oltorf Street Austin, TX 78704	none	approved 501(c)(3)	unrestricted gift	1,000.
Total from continuation sheets				25,107.