Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

▶ **Do not enter Social Security numbers on this form as it may be made public. By law, the IRS cannot redact the information on the form.**

▶ **Information about Form 990-PF and its instructions is at *www.irs.gov/form990pf*.**

OMB No 1545-0052

2013

Open to Public Inspection

For calendar year 2013, or tax year beginning 01-01-2013 , and ending 12-31-2013

Name of foundation
Mize Family Foundation

% ANNE B MIZE

Number and street (or P O box number if mail is not delivered to street address)
USPS 112
1463 E REPUBLICAN ST 132 Suite

Room/suite

City or town, state or province, country, and ZIP or foreign postal code
Seattle, WA 98112

A Employer identification number
27-1374636

B Telephone number (see instructions)
(206) 328-8661

C If exemption application is pending, check here ▶ ☐

G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change

D 1. Foreign organizations, check here ▶ ☐

2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐

E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐

H Check type of organization ☑ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year *(from Part II, col. (c), line 16)*▶$ 627,303

J Accounting method ☑ Cash ☐ Accrual ☐ Other (specify) ____________
(Part I, column (d) must be on cash basis.)

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐

Part I **Analysis of Revenue and Expenses** *(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))*

			(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc , received (attach schedule)	90,000			
	2	Check ▶ ☐ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments	8,597	8,597		
	4	Dividends and interest from securities	8,784	8,784		
	5a	Gross rents				
	b	Net rental income or (loss) ______				
	6a	Net gain or (loss) from sale of assets not on line 10	35,116			
	b	Gross sales price for all assets on line 6a 484,901				
	7	Capital gain net income (from Part IV, line 2)		35,116		
	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) (attach schedule)				
	11	Other income (attach schedule)				
	12	**Total.** Add lines 1 through 11	142,497	52,497		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	0			
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)	35	18		17
	b	Accounting fees (attach schedule)	1,500	750		750
	c	Other professional fees (attach schedule)	8,575	8,575		
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	2,189	270		
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings	3,433	1,717		1,716
	22	Printing and publications				
	23	Other expenses (attach schedule)	10,988	5,495		5,493
	24	**Total operating and administrative expenses.** Add lines 13 through 23	26,720	16,825		7,976
	25	Contributions, gifts, grants paid	231,500			231,500
	26	**Total expenses and disbursements.** Add lines 24 and 25	258,220	16,825		239,476
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	-115,723			
	b	**Net investment income** (if negative, enter -0-)		35,672		
	c	**Adjusted net income** (if negative, enter -0-)				

Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)

			Beginning of year (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	151,894	112,189	112,189
	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 ▶			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)			
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment basis ▶ Less accumulated depreciation (attach schedule) ▶			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	561,337	515,114	515,114
	14	Land, buildings, and equipment basis ▶ Less accumulated depreciation (attach schedule) ▶			
	15	Other assets (describe ▶)			
	16	**Total assets** (to be completed by all filers—see the instructions Also, see page 1, item I)	713,231	627,303	627,303
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶)			
	23	**Total liabilities** (add lines 17 through 22)		0	
Net Assets or Fund Balances		**Foundations that follow SFAS 117, check here** ▶ ☐ **and complete lines 24 through 26 and lines 30 and 31.**			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☑ **and complete lines 27 through 31.**			
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	713,231	627,303	
	30	**Total net assets or fund balances** (see page 17 of the instructions)	713,231	627,303	
	31	**Total liabilities and net assets/fund balances** (see page 17 of the instructions)	713,231	627,303	

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	713,231
2	Enter amount from Part I, line 27a	2	-115,723
3	Other increases not included in line 2 (itemize) ▶	3	29,795
4	Add lines 1, 2, and 3	4	627,303
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	627,303

Part IV Capital Gains and Losses for Tax on Investment Income

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

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

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

2	Capital gain net income or (net capital loss)	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	35,116
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8		3	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☑ No
If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see page 18 of the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2012	167,203	573,201	0 2917
2011	79,883	541,584	0 147499
2010	69,709	494,922	0 140848
2009	967	17,960	0 053842
2008			

2	**Total** of line 1, column (d).	2	0 633889
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0 158472
4	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.	4	638,583
5	Multiply line 4 by line 3.	5	101,198
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	357
7	Add lines 5 and 6.	7	101,555
8	Enter qualifying distributions from Part XII, line 4.	8	239,476

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

Part VI **Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)**

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1 Date of ruling or determination letter ________ **(attach copy of letter if necessary–see instructions)**				
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☑ and enter 1% of Part I, line 27b			1	357
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)				
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			2	
3	Add lines 1 and 2			3	357
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	357
6	Credits/Payments				
a	2013 estimated tax payments and 2012 overpayment credited to 2013	6a	960		
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	960
8	Enter any **penalty** for underpayment of estimated tax Check here ☐ 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	603
11	Enter the amount of line 10 to be **Credited to 2014 estimated tax** ▶ 603 **Refunded** ▶			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?	1a		No
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?	1b		No
	*If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year **(1)** On the foundation ▶ $ ________ **(2)** On foundation managers ▶ $ ________			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ ________			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2		No
	If "Yes," attach a detailed description of the activities.			
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		No
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5		No
	If "Yes," attach the statement required by General Instruction T.			
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either ● By language in the governing instrument, or ● By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col. (c), and Part XV.*	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶WA			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? *If "No," attach explanation*	8b		No
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*	9		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses.*	10	Yes	

Part VII-A Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	

Website address ▶

14 The books are in care of ▶ANNE B MIZE Telephone no ▶

Located at ▶1815 11TH AVE E Seattle WA ZIP+4 ▶98102

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 |

			Yes	No
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?	16		No
	See instructions for exceptions and filing requirements for Form TD F 90-22 1 If "Yes", enter the name of the foreign country ▶			

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required

	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.		**Yes**	**No**
1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☑ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☑ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☑ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☑ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☑ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☑ No			
b	If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?	1b		
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? ☐ Yes ☐ No			
	If "Yes," list the years ▶ 20____ , 20____ , 20____ , 20____			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement—see instructions)	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ▶ 20____ , 20____ , 20____ , 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☑ 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.)*	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?	4b		No

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

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

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ **Yes** ☑ **No**

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ **Yes** ☑ **No**

(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ **Yes** ☑ **No**

(4) Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions) ☐ **Yes** ☑ **No**

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ **Yes** ☑ **No**

b If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53 4945 or in a current notice regarding disaster assistance (see instructions)? **5b**

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? ☐ **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**

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b** **No**

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

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ **Yes** ☑ **No**

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? **7b** **No**

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	**(b)** Title, and average hours per week devoted to position	**(c)** Compensation **(If not paid, enter -0-)**	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
See Additional Data Table				

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

(a) Name and address of each employee paid more than $50,000	**(b)** Title, and average hours per week devoted to position	**(c)** Compensation	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances

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

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

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".

(a) Name and address of each person paid more than $50,000	**(b)** Type of service	**(c)** Compensation
Total number of others receiving over $50,000 for professional services. . . . . ▶		

Part IX-A **Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1 NOTE THE ONLY ACTIVITY OF THE FOUNDATION WILL BE DONATING TO VARIOUS ORGANIZATIONS THAT WERE SELECTED BY THE DIRECTORS	
2 THERE WERE NO DIRECT EXPENSES INCURRED IN MAKING THESE DONATIONS	
3	
4	

Part IX-B **Summary of Program-Related Investments** (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 NONE	
2	
All other program-related investments See page 24 of the instructions	
3	
Total. Add lines 1 through 3 . . . . ▶	

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes			
a	Average monthly fair market value of securities		1a	598,556
b	Average of monthly cash balances		1b	49,752
c	Fair market value of all other assets (see instructions)		1c	0
d	**Total** (add lines 1a, b, and c)		1d	648,308
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e		
2	Acquisition indebtedness applicable to line 1 assets		2	0
3	Subtract line 2 from line 1d		3	648,308
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)		4	9,725
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4		5	638,583
6	**Minimum investment return.** Enter 5% of line 5		6	31,929

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

1	Minimum investment return from Part X, line 6		1	31,929
2a	Tax on investment income for 2013 from Part VI, line 5	2a 357		
b	Income tax for 2013 (This does not include the tax from Part VI)	2b		
c	Add lines 2a and 2b		2c	357
3	Distributable amount before adjustments Subtract line 2c from line 1		3	31,572
4	Recoveries of amounts treated as qualifying distributions		4	
5	Add lines 3 and 4		5	31,572
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	31,572

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

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26	1a	239,476
b	Program-related investments—total from Part IX-B	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes	2	0
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	0
b	Cash distribution test (attach the required schedule)	3b	0
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	239,476
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	357
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	239,119

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					31,572
2 Undistributed income, if any, as of the end of 2013					
a Enter amount for 2012 only.				0	
b Total for prior years 2011 , 2010 , 2009			0		
3 Excess distributions carryover, if any, to 2013					
a From 2008.					
b From 2009.	965				
c From 2010.	45,151				
d From 2011.	52,864				
e From 2012.	140,461				
f Total of lines 3a through e.		239,441			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ $ 239,476					
a Applied to 2012, but not more than line 2a				0	
b Applied to undistributed income of prior years (Election required—see instructions).					
c Treated as distributions out of corpus (Election required—see instructions).					
d Applied to 2013 distributable amount.					31,572
e Remaining amount distributed out of corpus		207,904			
5 Excess distributions carryover applied to 2013					
(If an amount appears in column (d), the same amount must be shown in column (a).)					
6 Enter the net total of each column as indicated below:					
a Corpus Add lines 3f, 4c, and 4e Subtract line 5		447,345			
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.					
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 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)					
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions) . . .					
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a		447,345			
10 Analysis of line 9					
a Excess from 2009. . . .	965				
b Excess from 2010. . . .	45,151				
c Excess from 2011. . . .	52,864				
d Excess from 2012. . . .	140,461				
e Excess from 2013. . . .	207,904				

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9)

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2013, enter the date of the ruling. . . . . . . ▶

b Check box to indicate whether the organization is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			(e) Total
	(a) 2013	**(b)** 2012	**(c)** 2011	**(d)** 2010	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon **a** "Assets" alternative test—enter **(1)** Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test—enter **(1)** Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the organization had $5,000 or more in assets at any time during the year—see instructions.)

1 Information Regarding Foundation Managers:

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than $5,000) (See section 507(d)(2))

ANNE B MIZE

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

NONE

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ▶☑ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds If the foundation makes gifts, grants, etc (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

a The name, address, and telephone number of the person to whom applications should be addressed

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

c Any submission deadlines

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

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
a *Paid during the year* See Additional Data Table				
Total . . . . ▶ **3a**				231,500
b *Approved for future payment*				
Total . . . . ▶ **3b**				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments. . . .					
3 Interest on savings and temporary cash investments			14	8,597	
4 Dividends and interest from securities. . . .			14	8,784	
5 Net rental income or (loss) from real estate					
a Debt-financed property.					
b Not debt-financed property.					
6 Net rental income or (loss) from personal property					
7 Other investment income.					
8 Gain or (loss) from sales of assets other than inventory			18	35,116	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory. .					
11 Other revenue a					
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e). .				52,497	

13 Total. Add line 12, columns (b), (d), and (e). 13 52,497

(See worksheet in line 13 instructions to verify calculations)

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions)
1	THIS 501(C)(3) ORGANIZATION SUPPORTS VARIOUS CHARITABLE ENTITIES BY MAKING GRANTS TO OTHER 501(C)(3) ENTITIES THE INCOME LISTED IN COLUMN (C) IS USED TO MAKE GRANTS TO OTHER 501(C)(3) ENTITIES IN SUPPORT OF THEIR ACTIVITIES

Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

		Yes	No
1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a Transfers from the reporting foundation to a noncharitable exempt organization of			
(1) Cash	1a(1)		No
(2) Other assets	1a(2)		No
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization	1b(1)		No
(2) Purchases of assets from a noncharitable exempt organization	1b(2)		No
(3) Rental of facilities, equipment, or other assets	1b(3)		No
(4) Reimbursement arrangements	1b(4)		No
(5) Loans or loan guarantees	1b(5)		No
(6) Performance of services or membership or fundraising solicitations	1b(6)		No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		No

d If the answer to any of the above is "Yes," complete the following schedule Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received

(a) Line No	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☑ No

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Sign Here

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge

******	2014-04-30	******
Signature of officer or trustee	Date	Title

May the IRS discuss this return with the preparer shown below (see instr)? ☑ Yes ☐ No

Paid Preparer Use Only

Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ▶ ☐	PTIN
Erin S Morgan				
Firm's name ▶	JMW & ASSOCIATES LLC		Firm's EIN ▶	
Firm's address ▶	6400 Glenwood Suite 100 Overland Park, KS 66202		Phone no (913) 499-4920	

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

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	**(b)** How acquired P—Purchase D—Donation	**(c)** Date acquired (mo , day, yr)	**(d)** Date sold (mo , day, yr)
UBS #38349 - STMT A			2013-12-31
UBS #38349 - STMT A			2013-12-31
UBS #38349 - STMT A			2013-12-31
UBS #38349 - STMT A			2013-12-31
UBS #38349 - STMT A			2013-12-31
CAPITAL GAIN DIVIDENDS	P		

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

(e) Gross sales price	**(f)** Depreciation allowed (or allowable)	**(g)** Cost or other basis plus expense of sale	**(h)** Gain or (loss) (e) plus (f) minus (g)
188,889		164,776	24,113
187,251		191,786	-4,535
69,094		61,654	7,536
39,565		31,646	7,919
19		19	
			83

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			**(l)** Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	**(j)** Adjusted basis as of 12/31/69	**(k)** Excess of col (i) over col (j), if any	
			24,113
			-4,535
			7,440
			7,919

Form 990PF Part VIII Line 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
ANNE B MIZE 1815 11th Ave E SEATTLE, WA 98102	PRESIDENT 1 0	0	0	0
NANETTE FOK 1017 MINOR AVE 1203 SEATTLE, WA 98104	BOARD MEMBER 1 0	0	0	0
BILL MITCHELL 15075 108TH AVE SW VASHON ISLAND, WA 98070	BOARD MEMBER 1 0	0	0	0
SAVITHA REDDY PATHI 1402 THIRD AVE SUITE 1305 Seattle, WA 98101	BOARD MEMBER 1 0	0	0	0
KATRIN WILDE 603 STEWART ST SUITE 415 SEATTLE, WA 98101	BOARD MEMBER 1 0	0	0	0

Form 990PF Part XV Line 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
a *Paid during the year*				
Grist 710 Second Avenue Suite 860 Seattle, WA 98104	No Relationship	PC	Provides intellegent, irreverent environmental news and commentary	20,000
AKILI DADA 1016 LINCOLN BOULEVARD SAN FRANCISCO, CA 94129	No Relationship	PC	A leadership incubator investing in African women from underpriviledged backgrounds	15,000
Sightline 1402 Third Ave Suite 500 Seattle, WA 98101	No Relationship	PC	To make the Northwest global model of sustainability - strong communities, a green economy, and a healthy environment	12,500
Progress Alliance of Washington (WinWin) 1402 Third Ave Suite 201 Seattle, WA 98101	No Relationship	PC	Statewide network for taking action across issues AND TO IMPROVE COMMUNICATION AND COORDINATION AMONG NON-PROFIT CIVIC ENGAGEMENT ORGANIZATIONS	15,000
350org 155 Water St 6FL Brooklyn, NY 11201	No Relationship	PC	Building a global climate movement	20,000
Environmental Law Alliance Worldwide 1877 Garden Avenue Eugene, OR 97403	No Relationship	PC	Helps communities speak out for clean air, clean water, and a healthy planet	15,000
Global Press Institute 1012 Torney Ave Presidio San Francisco, CA 94129	No Relationship	PC	TO Educate, EMPLOY AND EMPOWER women in the developing world to produce high-quality local news COVERAGE TO ELEVATE GLOBAL AWARENESS AND IGNITE SOCIAL CHANGE	20,000
INTERIM CDA 310 MAYNARD AVENUE SOUTH SEATTLE, WA 98104	No Relationship	PC	Provides housing-related and community building services to Asian, Pacific Islander, and immigrant and refugee communities in Seattle	10,000
Center for Diversity & the Environment PO Box 10598 Portland, OR 97296	No Relationship	PC	TO Racially and ethnically diversifY the U S environmental movement BY DEVELOPING LEADERS, DIVERSIFYING INSTITUTIONS, AND BUILDING COMMUNITIES	15,000
New America Media 209 Ninth Street San Francisco, CA 94103	No Relationship	PC	To bring the voices of ethnic minorities, immigrants, young people, AND elderly, into the national discourse	10,000
NEW FIELD FOUNDATION-WE ARE THE SOLUTION 1016 LINCOLN BOULEVARD MAILBOX 14 SAN FRANCISCO, CA 94129	No Relationship	PC	Campaign led by African farmers to address the food crisis	12,000
RESOURCE MEDIA 600 STEWART STREET SUITE 1201 SEATTLE, WA 98101	NO RELATIONSHIP	PC	TO Develop and execute communications strategies FOR THE ENVIRONMENT AND PUBLIC HEALTH PARTNERS TO SUCCEED IN A DYNAMIC MEDIA LANDSCAPE	15,000
URGENT ACTION FUND-AFRICA 2301 MISSION STREET SUITE 105 SAN FRANCISCO, CA 94110	NO RELATIONSHIP	PC	Provide grants AND resources to women's organizations and activists in Africa	12,000
WASHINGTON ENVIRONMENTAL COUNCIL-POWER PAST COAL 1402 3RD AVENUE SUITE 1400 SEATTLE, WA 98101	NO RELATIONSHIP	PC	To stop coal export off the West Coast	25,000
ZIMBABWE ALLIANCE 2100 M STREET NW SUITE 170-350 WASHINGTON, DC 20037	NO RELATIONSHIP	PC	To promote a vibrant civil society and a successful transformation in Zimbabwe	15,000
Total . . . . ▶ **3a**				231,500

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Schedule B
(Form 990, 990-EZ, or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

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

OMB No 1545-0047

2013

Name of the organization	Employer identification number
Mize Family Foundation	27-1374636

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
Form 990-PF	☑ 501(c)(3) exempt private foundation
	☐ 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

☑ 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 II

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than $1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for 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 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 990PF, 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	Employer identification number
Mize Family Foundation	27-1374636

Part I **Contributors** (see instructions) Use duplicate copies of Part I if additional space is needed

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	ANNE B MIZE 1815 11TH AVE E SEATTLE, WA 98102	$ 90,000	Person ☑ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)

Name of organization	**Employer identification number**
Mize Family Foundation	27-1374636

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 organization
Mize Family Foundation

Employer identification number
27-1374636

Part III ***Exclusively* religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total more than $1,000 for the year.** Complete columns **(a)** through **(e) and** the following line entry
For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc , contributions of **$1,000 or less** for the year (Enter this information once See instructions) ▶ $
Use duplicate copies of Part III if additional space is needed

(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	Relationship of transferor to transferee

(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	Relationship of transferor to transferee

(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	Relationship of transferor to transferee

(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	Relationship of transferor to transferee

TY 2013 All Other Program Related Investments Schedule

Name: Mize Family Foundation

EIN: 27-1374636

Category	Amount
NONE	

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2013 Depreciation Schedule

Name: Mize Family Foundation

EIN: 27-1374636

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included

TY 2013 Investments - Land Schedule

Name: Mize Family Foundation

EIN: 27-1374636

TY 2013 Investments - Other Schedule

Name: Mize Family Foundation

EIN: 27-1374636

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
UBS		515,114	515,114

TY 2013 Land, Etc. Schedule

Name: Mize Family Foundation

EIN: 27-1374636

TY 2013 Other Expenses Schedule

Name: Mize Family Foundation

EIN: 27-1374636

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ADMINISTRATION EXPENSE	7,230	3,615		3,615
MEMBERSHIP EXPENSE	3,050	1,525		1,525
OFFICE EXPENSE	307	154		153
50% MEALS & ENTERTAINMENT	401	201		200

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TY 2013 Other Increases Schedule

Name: Mize Family Foundation

EIN: 27-1374636

Description	Amount
MARKET ADJUSTMENT	29,795

TY 2013 Substantial Contributors Schedule

Name: Mize Family Foundation

EIN: 27-1374636

Name	Address
ANNE B MIZE	1815 11TH AVE E SEATTLE, WA 98102

TY 2013 Taxes Schedule

Name: Mize Family Foundation

EIN: 27-1374636

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES	270	270		
2012 TAX	959			
2013 ESTIMATED TAX	960			

Proceeds from Broker Transactions

Short-term transactions for covered securities, included in Box 2a

Activity type	Quantity / face value (Box 1e)	Original cost basis ($)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount Box 2a) ($)	Cost or other basis (Box 3) ($)	Wash sale loss disallowed (Box 5) ($)	Federal income tax withheld (Box 4) ($)	Loss not allowed (Box 2b)	Gain/Loss ($)
Description (Box 8) ABBOTT LABS					CUSIP 002824100	Symbol (Box 1d) ABT				
Sell	35.0000		08/23/12	02/04/13	1,173.33	1,096.47				76.86
Description (Box 8) ABBVIE INC COM					CUSIP 00287Y109	Symbol (Box 1d) ABBV				
Sell	35.0000		08/23/12	02/01/13	1,294 97	1,189.03				105.94
Description (Box 8) ADOBE SYSTEMS INC (DELAWARE)					CUSIP 00724F101	Symbol (Box 1d) ADBE				
Sell	25 0000		08/23/12	06/28/13	1,142.23	840.40				301 83
Description (Box 8) AGILENT TECHNOLOGIES INC					CUSIP 00846U101	Symbol (Box 1d) A				
Sell	35.0000		08/23/12	06/28/13	1,504.97	1,311 80				193 17
Description (Box 8) AKAMAI TECHNOLOGIES INC					CUSIP 00971T101	Symbol (Box 1d) AKAM				
Sell	25.0000		08/23/12	06/28/13	1,060.73	929 25				131.48
Description (Box 8) AMGEN INC					CUSIP 031162100	Symbol (Box 1d) AMGN				
Sell	5.0000		08/23/12	06/28/13	493.69	417.40				76.29
Description (Box 8) APACHE CORP					CUSIP 037411105	Symbol (Box 1d) APA				
Sell	25 0000		08/23/12	06/28/13	2,090.46	2,198 25				(107.79)

continued next page

STATEMENT A

UBS Financial Services Inc.
1000 Harbor Boulevard
Weehawken, NJ 07086-6790
Federal ID 13-2638166

Your Financial Advisor:
JASON HAMLIN & THE ARBOR GROUP
206-628-8511/800-426-7531

Payer:
THE MIZE FAMILY FOUNDATION
1463 E REPUBLICAN ST, #132
USPS #112
SEATTLE WA 98112-4517

2013 Informational Statement

Account Number: WI 38349 LI
Tax Identification Number. 27-1374636

Proceeds from Broker Transactions (continued)

Short-term transactions for covered securities, included in Box 2a (continued)

Activity type	Quantity / face value (Box 1e)	Original cost basis ($)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) ($)	Cost or other basis (Box 3) ($)	Wash sale loss disallowed (Box 5) ($)	Federal income tax withheld (Box 4) ($)	Loss not allowed (Box 2b)	Gain/loss ($)
Description (Box 8) APPLE INC					CUSIP 037833100	*Symbol (Box 1d)* AAPL				
Sell	**5.0000**		06/28/13	10/15/13	**2,493.86**	**1,956.55**				**537.31**
Description (Box 8) APPLIED MATERIALS INC					CUSIP 038222105	*Symbol (Box 1d)* AMAT				
Sell	**100.0000**		06/28/13	10/15/13	**1,784.49**	**1,485.00**				**299.49**
Description (Box 8) BANCO BRADESCO S A NEW SPON ADR					CUSIP 059460303	*Symbol (Box 1d)* BBD				
Sell	**220.0000**		11/19/13	12/20/13	**2,686.15**	**2,955.70**				**(269.55)**
Description (Box 8) BG GROUP PLC SPON ADR					CUSIP 055434203	*Symbol (Box 1d)* BRGYY				
Sell	**50 0000**		08/23/12	06/28/13	**851 49**	**1,028.50**				**(177.01)**
Description (Box 8) BLDRS INDEX FUND EMERGING MKTS 50 ADR ETF					CUSIP 09348R300	*Symbol (Box 1d)* ADRE				
Sell	215 0000		11/29/12	11/19/13	8,270 02	8,278 55				(8 53)
Sell	130 0000		06/28/13	11/19/13	5,000 48	4,422 60				577 88
Sub Total	**345 0000**				**13,270.50**	**12,701 15**				**569 35**
Description (Box 8) BRISTOL MYERS SQUIBB CO					CUSIP 110122108	*Symbol (Box 1d)* BMY				
Sell	**15.0000**		08/23/12	06/28/13	**690.59**	**483.15**				**207.44**
Description (Box 8) BRITISH SKY BROADCASTING GROUP PLC SPONSORED ADR					CUSIP 111013108	*Symbol (Box 1d)* BSYBY				
Sell	**25 0000**		08/23/12	06/28/13	**1,204 48**	**1,212 25**				**(7.77)**

continued next page

STATEMENT 4

UBS Financial Services Inc.

1000 Harbor Boulevard
Weehawken, NJ 07086-6790
Federal ID 13-2638166

Your Financial Advisor:
JASON HAMLIN & THE ARBOR GROUP
206-628-8511/800-426-7531

Payer:
THE MIZE FAMILY FOUNDATION
1463 E REPUBLICAN ST, #132
USPS #112
SEATTLE WA 98112-4517

2013 Informational Statement

Account Number: WI 38349 LI
Tax Identification Number: 27-1374636

Proceeds from Broker Transactions (continued)

Short-term transactions for covered securities, included in Box 2a (continued)

Activity type	Quantity / face value (Box 1e)	Original cost basis ($)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) ($)	Cost or other basis (Box 3) ($)	Wash sale loss disallowed (Box 5) ($)	Federal income tax withheld (Box 4) ($)	Loss not allowed (Box 2b)	Gain/Loss ($)
Description (Box 8) CALIF WTR SERVICES GROUP HLDG CO DEL					CUSIP 130788102	Symbol (Box 1d) CWT				
Sell	35.0000		08/23/12	06/28/13	679.69	652 25				27 44
Description (Box 8) CALPINE CORP NEW					CUSIP 131347304	Symbol (Box 1d) CPN				
Sell	30.0000		11/29/12	06/28/13	635 39	514.39				121.00
Description (Box 8) CAMERON INTL CORP					CUSIP 13342B105	Symbol (Box 1d) CAM				
Sell	25.0000		08/23/12	06/28/13	1,537 47	1,352.25				185.22
Description (Box 8) CERNER CORP					CUSIP 156782104	Symbol (Box 1d) CERN				
Sell	20.0000		08/23/12	06/28/13	1,924.77	1,420.60				504.17
Description (Box 8) CHEVRON CORP					CUSIP 166764100	Symbol (Box 1d) CVX				
Sell	5.0000		08/23/12	06/28/13	593.44	557 09				36.35
Description (Box 8) CHINA MOBILE LTD SPON ADR					CUSIP 16941M109	Symbol (Box 1d) CHL				
Sell	10.0000		08/23/12	06/28/13	517 79	532.80				(15.01)
Description (Box 8) CISCO SYSTEMS INC					CUSIP 17275R102	Symbol (Box 1d) CSCO				
Sell	65.0000		08/23/12	06/28/13	1,588.57	1,243.45				345.12
Description (Box 8) COGNIZANT TECH SOLUTIONS CRP					CUSIP 192446102	Symbol (Box 1d) CTSH				
Sell	10 0000		08/23/12	06/28/13	615 39	651 20				(35.81)

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UBS Financial Services Inc.

1000 Harbor Boulevard
Weehawken, NJ 07086-6790
Federal ID 13-2638166

Your Financial Advisor:
JASON HAMLIN & THE ARBOR GROUP
206 628 8511/800-426-7531

Payer:
THE MIZE FAMILY FOUNDATION
1463 E REPUBLICAN ST #132
USPS #1 2
SEATTLE WA 98112 4517

2013 Informational Statement

Account Number: WI 38349 LI
Tax Identification Number: 27-1374636

Proceeds from Broker Transactions (continued)

Short-term transactions for covered securities, included in Box 2a (continued)

Activity type	Quantity / face value (Box 1e)	Original cost basis ($)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) ($)	Cost or other basis (Box 3) ($)	Wash sale loss disallowed (Box 5) ($)	Federal income tax withheld (Box 4) ($)	Loss not allowed (Box 2b)	Gain/Loss ($)
Description (Box 8) CORNING INC					*CUSIP* 219350105	*Symbol (Box 1d)* GLW				
Sell	**100.0000**		08/23/12	06/28/13	**1,429.98**	**1,156.78**				**273.20**
Description (Box 8) COSTCO WHOLESALE CORP					*CUSIP* 22160K105	*Symbol (Box 1d)* COST				
Sell	**15.0000**		08/23/12	06/28/13	**1,668.12**	**1,423.50**				**244.62**
Description (Box 8) CREDIT SUISSE GROUP SPON ADR					*CUSIP* 225401108	*Symbol (Box 1d)* CS				
Cash in Lieu	0 4390		08/23/12	05/20/13	13 26	8 26				5 00
Sell	47 0000		08/23/12	06/28/13	1,240 78	884 00				356 78
Sub Total	**47 4390**				**1,254.04**	**892.26**				**361.78**
Description (Box 8) DESARROLLADORA HOMEX S A DE C V SPON ADR					*CUSIP* 25030W100	*Symbol (Box 1d)* HXM				
Sell	**400 0000**		06/28/13	07/29/13	**679.99**	**1,436.00**				**(756 01)**
Description (Box 8) DR REDDY S LABS LTD ADR					*CUSIP* 256135203	*Symbol (Box 1d)* RDY				
Sell	**25 0000**		08/23/12	06/28/13	**927 23**	**751.50**				**175 73**
Description (Box 8) EBAY INC					*CUSIP* 278642103	*Symbol (Box 1d)* EBAY				
Sell	**30.0000**		08/23/12	06/28/13	**1,550.37**	**1,405.50**				**144 87**
Description (Box 8) EMERSON ELECTRIC CO					*CUSIP* 291011104	*Symbol (Box 1d)* EMR				
Sell	**25.0000**		08/23/12	06/28/13	**1,382 73**	**1,290.75**				**91 98**

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STATEMENT 7

Proceeds from Broker Transactions (continued)

Short-term transactions for covered securities, included in Box 2a (continued)

Activity type	Quantity / face value (Box 1e)	Original cost basis ($)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) ($)	Cost or other basis (Box 3) ($)	Wash sale loss disallowed (Box 5) ($)	Federal income tax withheld (Box 4) ($)	Loss not allowed (Box 2)	Gain/Loss ($)
Description (Box 8) EMPRESA NACIONAL DE ELEC CHILE SPONSORED ADR ADR					CUSIP 29244T101		Symbol (Box 1d) EOC			
Sell	20.0000		08/23/12	06/28/13	871 78	997.49				(125.71)
Description (Box 8) FEDEX CORP					CUSIP 31428X106		Symbol (Box 1d) FDX			
Sell	5 0000		08/23/12	06/28/13	494.54	444.55				49.99
Description (Box 8) FIRST SOLAR INC					CUSIP 336433107		Symbol (Box 1d) FSLR			
Sell	50 0000		08/23/12	01/07/13	1,587 98	1,227 76				360 22
Sell	15 0000		08/23/12	06/28/13	673 34	368 33				305 01
Sell	20 0000		10/15/13	11/27/13	1,210 10	875 60				334 50
Sub Total	85.0000				3,471.42	2,471.69				999.73
Description (Box 8) GABELLI CONVERTIBLE & INCOME SECS FUND INC					CUSIP 36240B109		Symbol (Box 1d) GCV			
Sell	220.0000		11/29/12	11/19/13	1,351 36	1,148 79				202.57
Description (Box 8) GOOGLE INC CL A					CUSIP 38259P508		Symbol (Box 1d) GOOG			
Sell	1.0000		11/29/12	11/19/13	1,026.32	691.81				334 51
Description (Box 8) HANESBRANDS INC					CUSIP 410345102		Symbol (Box 1d) HBI			
Sell	50.0000		08/23/12	06/28/13	2,544 46	1,606.49				937.97
Description (Box 8) HARTFORD FINCL SERVICES GROUP INC					CUSIP 416515104		Symbol (Box 1d) HIG			
Sell	100.0000		08/23/12	06/28/13	3,109.95	1,809.78				1,300.17

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STATEMENT 7

Proceeds from Broker Transactions (continued)

Short-term transactions for covered securities, included in Box 2a (continued)

Activity type	Quantity / face value (Box 1e)	Original cost basis ($)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) ($)	Cost or other basis (Box 3) ($)	Wash sale loss disallowed (Box 5) ($)	Federal income tax withheld (Box 4) ($)	Loss not allowed (Box 2b)	Gain/loss $)
Description (Box 8) ICICI BANK LTD SPON ADR					*CUSIP* 45104G104	*Symbol (Box 1d)* IBN				
Sell	35 0000		08/23/12	06/28/13	1,329 98	1,230 48				99.50
Description (Box 8) IDACORP INC (HOLDING COMPANY)					*CUSIP* 451107106	*Symbol (Box 1d)* IDA				
Sell	30.0000		08/23/12	06/28/13	1,430.98	1,252.49				178.49
Description (Box 8) INFOSYS LTD SPON ADR					*CUSIP* 456788108	*Symbol (Box 1d)* INFY				
Sell	15.0000		08/23/12	06/28/13	612.14	656 55				(44 41)
Description (Box 8) ING GROEP N V NL SPON ADR					*CUSIP* 456837103	*Symbol (Box 1d)* ING				
Sell	125 0000		08/23/12	06/28/13	1,136 23	907 18				229 05
Sell	80 0000		10/15/13	11/19/13	1,029 07	982 97				46 10
Sub Total	**205.0000**				**2,165.30**	**1,890.15**				**275.15**
Description (Box 8) INTL BUSINESS MACH					*CUSIP* 459200101	*Symbol (Box 1d)* IBM				
Sell	10 0000		08/23/12	06/28/13	1,917 37	1,959.70				(42.33)
Description (Box 8) ISHARES INTL DEVELOPED REAL ESTATE ETF					*CUSIP* 464288489	*Symbol (Box 1d)* IFGL				
Sell	80.0000		08/23/12	06/28/13	2,498.36	2,421.76				76.60
Description (Box 8) ISHARES MSCI EAFE ETF					*CUSIP* 464287465	*Symbol (Box 1d)* EFA				
Sell	165 0000		06/28/13	11/19/13	10,898.62	9,457.80				1,440.82

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STATEMENT

Proceeds from Broker Transactions (continued)

Short-term transactions for covered securities, included in Box 2a (continued)

Activity type	Quantity / face value (Box 1e)	Original cost basis ($)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) ($)	Cost or other basis (Box 3) ($)	Wash sale loss disallowed (Box 5) ($)	Federal income tax withheld Box 4 ($)	Loss not allowed Box 2b	Gain/loss ($)
Description (Box 8) ISHARES MSCI USA ESG SELECT ETF					CUSIP 464288802	Symbol (Box 1d) KLD				
Sell	125.0000		10/15/13	11/19/13	9,271.37	8,888.54				382 83
Description (Box 8) ISHARES TRUST S&P LATIN AMER 40 INDEX FUND					CUSIP 464287390	Symbol (Box 1d) ILF				
Sell	100.0000		11/29/12	11/19/13	3,891 93	4,188 50				(296.57)
Description (Box 8) ISHARES TRUST S&P MIDCAP 400 VALUE INDEX FUND					CUSIP 464287705	Symbol (Box 1d) IJJ				
Sell	100 0000		11/29/12	11/19/13	11,284.53	8,592.38				2,692.15
Description (Box 8) JPMORGAN CHASE & CO					CUSIP 46625H100	Symbol (Box 1d) JPM				
Sell	70.0000		08/23/12	06/28/13	3,718.34	2,617.84				1,100 50
Description (Box 8) JUNIPER NETWORKS INC					CUSIP 48203R104	Symbol (Box 1d) JNPR				
Sell	25.0000		08/23/12	06/28/13	476.24	459.50				16.74
Description (Box 8) KONINKLIJKE PHILIPS NV SPON ADR					CUSIP 500472303	Symbol (Box 1d) PHG				
Sell	56.0000		08/23/12	06/28/13	1,528.77	1,292 74				236.03
Description (Box 8) KYOCERA CORP ADR JAPAN ADR					CUSIP 501556203	Symbol (Box 1d) KYO				
Sell	10 0000		11/29/12	06/28/13	1,013.38	908 70				104 68
Description (Box 8) MATTEL INC					CUSIP 577081102	Symbol (Box 1d) MAT				
Sell	15.0000		08/23/12	06/28/13	671.69	520 05				151.64

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STATEMENT 11

Proceeds from Broker Transactions (continued)

Short-term transactions for covered securities, included in Box 2a (continued)

Activity type	Quantity / face value (Box 1e)	Original cost basis ($)	Date acquired (Box 1b)	Date of sale/exchange (Box 1a)	Sale amount (Box 2a) ($)	Cost or other basis (Box 3) ($)	Wash sale loss disallowed (Box 5) ($)	Federal income tax withheld (Box 4) ($)	Loss not allowed (Box 2b)	Gain/Loss ($)
Description (Box 8) MCGRAW HILL FINANCIAL INC					*CUSIP* 580645109	*Symbol (Box 1d)* MHFI				
Sell	30 0000		08/23/12	02/04/13	1,529 97	1,485 30				44 67
Sell	25 0000		08/23/12	02/08/13	1,078 54	1,237 75				(159 21)
Sell	30 0000		06/28/13	11/19/13	2,207 36	1,597 20				610 16
Sell	10 0000		10/15/13	11/19/13	735 79	672 06				63 73
Sub Total	**95.0000**				**5,551.66**	**4,992.31**				**559 35**
Description (Box 8) MEDTRONIC INC					*CUSIP* 585055106	*Symbol (Box 1d)* MDT				
Sell	**45 0000**		08/23/12	06/28/13	**2,338 61**	**1,817.86**				**520.75**
Description (Box 8) NATIONAL GRID PLC NEW SPON ADR					*CUSIP* 636274300	*Symbol (Box 1d)* NGG				
Sell	**5.0000**		08/23/12	06/28/13	**282 09**	**272.15**				**9.94**
Description (Box 8) NEXTERA ENERGY INC COM					*CUSIP* 65339F101	*Symbol (Box 1d)* NEE				
Sell	**15.0000**		08/23/12	06/28/13	**1,218.13**	**1,012.05**				**206.08**
Description (Box 8) NORDSTROM INC					*CUSIP* 655664100	*Symbol (Box 1d)* JWN				
Sell	**25.0000**		08/23/12	06/28/13	**1,486 97**	**1,427 75**				**59.22**
Description (Box 8) NVIDIA CORP					*CUSIP* 67066G104	*Symbol (Box 1d)* NVDA				
Sell	50 0000		08/23/12	06/28/13	700 49	715 87				(15 38)
Sell	10 0000		11/29/12	11/19/13	155 00	120 40				34 60

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STATEMENT

UBS Financial Services Inc.

1000 Harbor Boulevard
Weehawken, NJ 07086-6790
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2013 Informational Statement

Account Number: WI 38349 LI
Tax Identification Number: 27-1374636

Proceeds from Broker Transactions (continued)

Short-term transactions for covered securities, included in Box 2a (continued)

Activity type	Quantity / face value (Box 1a)	Original cost basis ($)	Date acquired (Box 1b)	Date of sale / exchange (Box 1c)	Sale amount (Box 2a) ($)	Cost or other basis (Box 3) ($)	Wash sale loss disallowed (Box 5) ($)	Federal income tax withheld (Box 4) ($)	Loss not allowed (Box 2b)	Gain/loss ($)
Description (Box 8) NVIDIA CORP					CUSIP 67066G104		Symbol (Box 1d) NVDA			
Sell	30 0000		10/15/13	11/19/13	464 99	462 39				2 60
Sub Total	**90.0000**				**1,320.48**	**1,298.66**				**21.82**
Description (Box 8) OMNICOM GROUP INC					CUSIP 681919106		Symbol (Box 1d) OMC			
Sell	**30.0000**		08/23/12	06/28/13	**1,891.77**	**1,531.80**				**359 97**
Description (Box 8) ORACLE CORP					CUSIP 68389X105		Symbol (Box 1d) ORCL			
Sell	**30.0000**		08/23/12	06/28/13	**908.98**	**949.50**				**(40 52)**
Description (Box 8) OWENS CORNING NEW					CUSIP 690742101		Symbol (Box 1d) OC			
Sell	**30.0000**		08/23/12	06/28/13	**1,204.48**	**963.30**				**241.18**
Description (Box 8) PITNEY BOWES INC					CUSIP 724479100		Symbol (Box 1d) PBI			
Sell	**80 0000**		08/23/12	06/28/13	**1,202.38**	**1,086.93**				**115.45**
Description (Box 8) POWERSHARES CLEANTECH ETF PORTFOLIO					CUSIP 73935X278		Symbol (Box 1d) PZD			
Sell	80 0000		08/23/12	02/13/13	2,005 75	1 705 12				300 63
Sell	120 0000		08/23/12	06/28/13	3,046 75	2,557 68				489 07
Sell	140 0000		10/15/13	11/19/13	4,188 74	4 070 16				118 58
Sub Total	**340 0000**				**9,241.24**	**8,332.96**				**908.28**

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STATEMENT 4

UBS Financial Services Inc.
1000 Harbor Boulevard
Weehawken, NJ 07086-6790
Federal ID 13-2638166

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JASON HAMLIN & THE ARBOR GROUP
206-628-8511/800-426-7531

Payer:
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USFS #112
SEATTLE WA 98112-4517

2013 Informational Statement

Account Number. WI 38349 LI
Tax Identification Number: 27-1374636

Proceeds from Broker Transactions (continued)

Short-term transactions for covered securities, included in Box 2a (continued)

Activity type	Quantity / face value (Box 1e)	Original cost basis ($)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) ($)	Cost or other basis (Box 3) ($)	Wash sale loss disallowed (Box 5) ($)	Federal income tax withheld (Box 4) ($)	Loss not allowed (Box 2b)	Gain/Loss ($)
Description (Box 8) POWERSHARES DYN TECHNOLOGY					*CUSIP* 73935X344	*Symbol (Box 1d)* PTF				
Sell	125 0000		08/23/12	02/13/13	3,539 92	3,358 00				181 92
Sell	135 0000		08/23/12	06/28/13	4,039 13	3,626 64				412 49
Sell	10 0000		11/29/12	11/19/13	340 05	256 35				83 70
Sell	180 0000		10/15/13	11/19/13	6,121 07	5,939 19				181 88
Sub Total	**450.0000**				**14,040.17**	**13,180.18**				**859 99**
Description (Box 8) POWERSHARES WILDERHILL CLEAN ENERGY PORTFOLIO					*CUSIP* 73935X500	*Symbol (Box 1d)* PBW				
Sell	**50.0000**		08/23/12	06/28/13	**269 49**	**215.43**				**54.06**
Description (Box 8) PROGRESSIVE CORP OHIO					*CUSIP* 743315103	*Symbol (Box 1d)* PGR				
Sell	**45.0000**		08/23/12	06/28/13	**1,135.33**	**883.35**				**251.98**
Description (Box 8) QUESTAR CORP					*CUSIP* 748356102	*Symbol (Box 1d)* STR				
Sell	**40.0000**		08/23/12	06/28/13	**955 98**	**793.38**				**162.60**
Description (Box 8) REPSOL SA SPON ADR					*CUSIP* 76026T205	*Symbol (Box 1d)* REPYY				
Sell	**90 0000**		08/23/12	06/28/13	**1,900.98**	**1,608.30**				**292.68**
Description (Box 8) ROCHE HLDG LTD SPONS ADR SWITZ ADR					*CUSIP* 771195104	*Symbol (Box 1d)* RHHBY				
Sell	**25 0000**		08/23/12	06/28/13	**1,533.47**	**1,128.75**				**404 72**
Description (Box 8) ROYAL BANK OF CANADA CAD					*CUSIP* 780087102	*Symbol (Box 1d)* RY				
Sell	**30 0000**		08/23/12	06/28/13	**1,742.37**	**1,608 00**				**134 37**

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STATEMENT A

Proceeds from Broker Transactions (continued)

Short-term transactions for covered securities, included in Box 2a (continued)

Activity type	Quantity, face value (Box 1e)	Original cost basis ($)	Date acquired (Box 1b)	Date of sale/exchange (Box 1a)	Sale amount (Box 2a) ($)	Cost or other basis (Box 3) ($)	Wash sale loss disallowed (Box 5) ($)	Federal income tax withheld (Box 4) ($)	Loss not allowed (Box 2b)	Gain/Loss ($)
Description (Box 8) SANOFI SPON ADR					CUSIP 80105N105		Symbol (Box 1d) SNY			
Sell	30.0000		08/23/12	06/28/13	1,558.77	1,220.70				338.07
Description (Box 8) SASOL LTD SPON ADR					CUSIP 803866300		Symbol (Box 1d) SSL			
Sell	40 0000		08/23/12	06/28/13	1,697 57	1,719.20				(21.63)
Description (Box 8) SPECTRA ENERGY CORP					CUSIP 847560109		Symbol (Box 1d) SE			
Sell	20.0000		08/23/12	06/28/13	682.39	577.00				105.39
Description (Box 8) SUNTRUST BANKS INC					CUSIP 867914103		Symbol (Box 1d) STI			
Sell	15.0000		11/29/12	10/15/13	497 99	405.10				92 89
Description (Box 8) SYSCO CORP					CUSIP 871829107		Symbol (Box 1d) SYY			
Sell	10.0000		08/23/12	06/28/13	342.99	301.00				41 99
Description (Box 8) TAIWAN SEMICONDUCTOR MFG CO LTD ADR					CUSIP 874039100		Symbol (Box 1d) TSM			
Sell	70.0000		08/23/12	06/28/13	1,285.18	1,001.52				283 66
Description (Box 8) TELEFONICA S A SPON ADR					CUSIP 879382208		Symbol (Box 1d) TEF			
Sell	30.0000		08/23/12	06/28/13	385.19	382.65				2.54
Description (Box 8) TEVA PHARMACEUTICALS IND LTD ISRAEL ADR					CUSIP 881624209		Symbol (Box 1d) TEVA			
Sell	40 0000		08/23/12	06/28/13	1,552 77	1,618.80				(66.03)

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STATEMENT 4

Proceeds from Broker Transactions (continued)

Short-term transactions for covered securities, included in Box 2a (continued)

Activity type	Quantity / face value (Box 1e)	Original cost basis ($)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount Box 2a ($)	Cost or other basis (Box 3) ($)	Wash sale loss disallowed (Box 5) ($)	Federal income tax withheld (Box 4) ($)	Loss not allowed (Box 2b)	Gain/Loss ($)
Description (Box 8) THERMO FISHER SCIENTIFIC INC					CUSIP 883556102	Symbol (Box 1d) TMO				
Sell	20.0000		08/23/12	06/28/13	1,702.17	1,127.00				575.17
Description (Box 8) TIMKEN CO					CUSIP 887389104	Symbol (Box 1d) TKR				
Sell	35.0000		08/23/12	06/28/13	1,974.32	1,456.00				518.32
Description (Box 8) TOYOTA MOTOR CORP NEW JAPAN SPON ADR					CUSIP 892331307	Symbol (Box 1d) TM				
Sell	40 0000		08/23/12	06/28/13	4,852.32	3,282.40				1,569.92
Description (Box 8) UNILEVER PLC AMER SHS NEW SPON ADR					CUSIP 904767704	Symbol (Box 1d) UL				
Sell	70.0000		08/23/12	06/28/13	2,844 75	2,493 24				351.51
Description (Box 8) WALT DISNEY CO (HOLDING CO) DISNEY COM					CUSIP 254687106	Symbol (Box 1d) DIS				
Sell	25.0000		08/23/12	06/28/13	1,592.22	1,227.42				364 80
Description (Box 8) WASTE MGMT INC NEW					CUSIP 94106L109	Symbol (Box 1d) WM				
Sell	25.0000		08/23/12	06/28/13	1,003 48	858.00				145.48
Description (Box 8) WEYERHAEUSER CO					CUSIP 962166104	Symbol (Box 1d) WY				
Sell	10.0000		08/23/12	06/28/13	281.39	246 27				35.12
Description (Box 8) WISC ENERGY CORP					CUSIP 976657106	Symbol (Box 1d) WEC				
Sell	15.0000		08/23/12	06/28/13	601 64	574 65				26 99

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STATEMENT 4

Proceeds from Broker Transactions (continued)

Short-term transactions for covered securities, included in Box 2a (continued)

Activity type	Quantity / face value (Box 1e)	Original cost basis ($)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount Box 2a) ($)	Cost or other basis (Box 3) ($)	Wash sale loss disallowed (Box 5) ($)	Federal income tax withheld (Box 4) ($)	Loss not allowed (Box 2b)	Gain/Loss ($)
Description (Box 8) WSTN DIGITAL CORP					*CUSIP* 958102105	*Symbol (Box 1d)* WDC				
Sell	35.0000		08/23/12	06/28/13	2,181.16	1,527.05				654.11
Description (Box 8) XEROX CORP					*CUSIP* 984121103	*Symbol (Box 1d)* XRX				
Sell	145.0000		08/23/12	06/28/13	1,322 38	1,062.10				260.28
Total	5,499.4390				$188,889 00	$164,775 76				$24,113.24

Short-term transactions for noncovered securities, included in Box 2a

Activity type	Quantity / face value (Box 1e)	Original cost basis ($)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) ($)	Cost or other basis (Box 3) ($)	Wash sale loss disallowed (Box 5) ($)	Federal income tax withheld (Box 4) ($)	Loss not allowed (Box 2b)	Gain/Loss ($)
Description (Box 8) AUTODESK INC B/E 01 950% 121517 DTD121312 FC061513 CALL@MW+25BP					*CUSIP* 052769AA4					
Sell	15,000.0000		09/05/13	11/06/13	14,931.90	14,559 30				372.60
Description (Box 8) BANK OF AMER INTERNOTES 06 900% 091538 DTD091808 FC031509 NTS CALLABLE					*CUSIP* 06050XD83	*Symbol (Box 1d)* RWZTH				
Sell	25,000.0000		01/10/13	05/27/13	24,925.00	25,977.25				(1,052 25)
Description (Box 8) BMC SOFTWARE INC NTS B/E 04 250% 021522 DTD021312 FC081512					*CUSIP* 055921AB6					
Sell	15,000.0000		01/09/13	08/20/13	14,707.50	15,319.14				(611.64)
Description (Box 8) COMPUTER SCIENCES CORP 04 450% 091522 DTD091812 FC031513 CALL@MW+45BP					*CUSIP* 205363AN4					
Sell	15,000 0000		09/13/12	06/27/13	14,744 55	15,116.46				(371.91)

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Proceeds from Broker Transactions (continued)

Short-term transactions for noncovered securities, included in Box 2a (continued)

Activity type	Quantity / face value (Box 1e)	Original cost basis ($)	Date acquired (Box 1b)	Date of sale or exchange (Box 1c)	Sale amount (Box 2a) ($)	Cost or other basis (Box 3) ($)	Wash sale loss disallowed (Box 5) ($)	Federal income tax withheld (Box 4) ($)	Loss not allowed (Box 2b)	Gain/Loss ($)
Description (Box 8) GENWORTH FINANCIAL INC 04 950% 100115 DTD091905 CALL@MW+15BP NTS					CUSIP 37247DAF3					
Redemption	5,000.0000		01/15/13	09/16/13	5,438 55	5,270.00				168 55
Description (Box 8) HEWLETT PACKARD CO CALL 02 600% 091517 DTD031212 FC091512 @ MW+30BP					CUSIP 428236BW2					
Sell	15,000 0000		08/24/12	06/27/13	14,960 85	14,895 15				65 70
Sell	15,000 0000		09/12/12	06/27/13	14,960 85	14,942 10				18 75
Sell	10,000 0000		10/22/12	06/27/13	9,973 90	9,818 60				155 30
Sub Total	**40,000.0000**				**39,895.60**	**39,655 85**				**239.75**
Description (Box 8) MARRIOTT INTL INC NEW 03 250% 091522 DTD091012 FC031513 CALL@MW +30BP					CUSIP 571903AK9					
Sell	15,000.0000		09/11/12	06/27/13	14,048.55	14,879.55				(831.00)
Description (Box 8) MORGAN STANLEY NTS B/E 04 750% 040114 DTD033004 FC100104					CUSIP 61748AAF6					
Sell	25,000 0000		01/24/13	06/27/13	25,578 25	25,887 75				(309 50)
Description (Box 8) NOMURA HOLDINGS INC NTS 02 000% 091316 DTD031313 FC091313 B/E					CUSIP 65535HAD1					
Sell	5,000 0000		03/25/13	06/27/13	4,919 85	5,003.09				(83.24)
Description (Box 8) SYMANTEC CORP B/E 03 950% 061522 DTD061412 CALL@MW+40BP					CUSIP 871503AK4					
Sell	15,000.0000		08/24/12	08/19/13	14,399 10	15,279.60				(880 50)

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STATEMENT

Proceeds from Broker Transactions (continued)

Short-term transactions for noncovered securities, included in Box 2a (continued)

Activity type	Quantity / face value (Box 1e)	Original cost basis ($)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) ($)	Cost or other basis (Box 3) ($)	Wash sale loss disallowed (Box 5) ($)	Federal income tax withheld (Box 4) ($)	Loss not allowed (Box 2b)	Gain/Loss ($)
Description (Box 8) WASTE MGMT INC 02 900% 091522 DTD091212 FC031513 CALL@MW+20BP					CUSIP 94106LAY5					
Sell	15,000 0000		09/12/12	09/11/13	13,662 60	14,837.55				(1,174.95)
Total	190,000 0000				$187,251 45	$191,785.54				$(4,534.09)

Long-term transactions for covered securities, included in Box 2a

Activity type	Quantity / face value (Box 1c)	Original cost basis ($)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) ($)	Cost or other basis (Box 3) ($)	Wash sale loss disallowed (Box 5) ($)	Federal income tax withheld (Box 4) ($)	Loss not allowed (Box 2b)	Gain/Loss ($)
Description (Box 8) BROOKFIELD TOTAL RETURN FD INC					CUSIP 11283U108		Symbol (Box 1d) HTR			
Sell	327 0000		09/21/12	12/17/13	7,463 55	7,934 61				(471.06)
Description (Box 8) EMERSON ELECTRIC CO					CUSIP 291011104		Symbol (Box 1d) EMR			
Sell	5 0000		08/23/12	10/15/13	323 99	258 14				65.85
Description (Box 8) FEDEX CORP					CUSIP 31428X106		Symbol (Box 1d) FDX			
Sell	5 0000		08/23/12	10/15/13	601 54	444.55				156 99
Description (Box 8) FIRST SOLAR INC					CUSIP 336433107		Symbol (Box 1d) FSLR			
Sell	25 0000		08/23/12	11/19/13	1,510 22	613 88				896 34
Sell	10 0000		08/23/12	11/27/13	605 05	245 55				359 50
Sub Total	35.0000				2,115.27	859.43				1,255 84

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STATEMENT #4

UBS Financial Services Inc.
1000 Harbor Boulevard
Weehawken, NJ 07086-6790
Federal ID 13-2638166

Your Financial Advisor:
JASON HAMLIN & THE ARBOR GROUP
206-628-8511/800 426-7531

Payer:
THE MIZE FAMILY FOUNDATION
1463 E REPUBLICAN ST, #132
USPS #112
SEATTLE WA 98112-4517

2013 Informational Statement

Account Number. WI 38349 LI
Tax Identification Number: 27-1374636

Proceeds from Broker Transactions (continued)

Long-term transactions for covered securities, included in Box 2a (continued)

Activity type	Quantity / face value (Box 1c)	Original cost basis ($)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) ($)	Cost or other basis (Box 3) ($)	Wash sale loss disallowed (Box 5) ($)	Federal income tax withheld (Box 4) ($)	Loss not allowed (Box 2b)	Gain/Loss ($)
Description (Box 8) FIRST TRUST ISE GLOBAL WIND ENERGY INDEX FUND					CUSIP 33736G106	Symbol (Box 1d) FAN				
Sell	55.0000		08/23/12	11/19/13	607 38	352 60				254.78
Description (Box 8) FRANKLIN/TEMPLETON GLOBAL BOND FUND CLASS A					CUSIP 880208103	Symbol (Box 1d) TPINX				
Sell	213 5130		08/23/12	10/15/13	2,809 83	2,816 24	0 34			(6.07)
Description (Box 8) GABELLI CONVERTIBLE & INCOME SECS FUND INC					CUSIP 36240B109	Symbol (Box 1d) GCV				
Sell	1,165.0000		08/23/12	11/19/13	7,156.06	6,505.63				650.43
Description (Box 8) ING GROEP N V NL SPON ADR					CUSIP 456837103	Symbol (Box 1d) ING				
Sell	75 0000		08/23/12	11/19/13	964.75	544 30				420.45
Description (Box 8) INTEL CORP					CUSIP 458140100	Symbol (Box 1d) INTC				
Sell	110.0000		05/24/12	06/28/13	2,635.55	2,806.86				(171 31)
Description (Box 8) INTL BUSINESS MACH					CUSIP 459200101	Symbol (Box 1d) IBM				
Sell	15 0000		08/23/12	12/17/13	2,652.10	2,939.55	95.82			(191.63)
Description (Box 8) ISHARES INTL DEVELOPED REAL ESTATE ETF					CUSIP 464288489	Symbol (Box 1d) IFGL				
Sell	60.0000		08/23/12	11/19/13	2,023.76	1,816.32				207 44
Description (Box 8) ISHARES MSCI USA ESG SELECT ETF					CUSIP 464288802	Symbol (Box 1d) KLD				
Sell	210 0000		08/23/12	11/19/13	15,575.89	12,338 36				3,237.53

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STATEMENT 7

Proceeds from Broker Transactions (continued)

Long-term transactions for covered securities, included in Box 2a (continued)

Activity type	Quantity / face value (Box 1c)	Original cost basis ($)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) ($)	Cost or other basis (Box 3) ($)	Wash sale loss disallowed (Box 5) ($)	Federal income tax withheld (Box 4) ($)	Loss not allowed (Box 2b)	Gain/Loss ($)
Description (Box 8) ISHARES US PFD STOCK ETF INDEX FUND					CUSIP 464288687	Symbol (Box 1d) PFF				
Sell	5.0000		08/23/12	10/15/13	187.54	197.79				(10.25)
Sell	280.0000		08/23/12	11/19/13	10,618.76	11,076.17				(457.41)
Sub Total	285.0000				10,806.30	11,273.96				(467.66)
Description (Box 8) KONINKLIJKE PHILIPS NV SPON ADR					CUSIP 500472303	Symbol (Box 1d) PHG				
Sell	30.0000		08/23/12	10/15/13	984.58	692.54				292.04
Description (Box 8) METLIFE INC					CUSIP 59156R108	Symbol (Box 1d) MET				
Sell	20.0000		08/23/12	10/15/13	967.98	691.80				276.18
Description (Box 8) NEXTERA ENERGY INC COM					CUSIP 65339F101	Symbol (Box 1d) NEE				
Sell	10.0000		08/23/12	11/19/13	874.54	674.70				199.84
Description (Box 8) NVIDIA CORP					CUSIP 67066G104	Symbol (Box 1d) NVDA				
Sell	50.0000		08/23/12	11/19/13	774.99	714.66				60.33
Description (Box 8) PITNEY BOWES INC					CUSIP 724479100	Symbol (Box 1d) PBI				
Sell	15.0000		08/23/12	11/19/13	352.04	203.80				148.24
Description (Box 8) POWERSHARES DYN TECHNOLOGY					CUSIP 73935X344	Symbol (Box 1d) PTF				
Sell	55.0000		08/23/12	11/19/13	1,870.33	1,477.52				392.81

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STATEMENT 7

Proceeds from Broker Transactions (continued)

Long-term transactions for covered securities, included in Box 2a (continued)

Activity type	Quantity / face value (Box 1e)	Original cost basis ($)	Date acquired (Box 1b)	Date of sale / exchange (Box 1c)	Sale amount (Box 2a) ($)	Cost or other basis (Box 3) ($)	Wash sale loss disallowed (Box 5) ($)	Federal income tax withheld (Box 4) ($)	Loss not allowed (Box 2b)	Gain/Loss ($)
Description (Box 8) QUESTAR CORP						CUSIP 748356102	Symbol (Box 1d) STR			
Sell	25.0000		08/23/12	11/19/13	574.99	495 85				79.14
Description (Box 8) SPDR BARCLAYS INTL TREAS BOND ETF						CUSIP 78464A516	Symbol (Box 1d) BWX			
Sell	10.0000		08/23/12	10/15/13	583.29	602.05				(18.76)
Description (Box 8) TELEFONICA S A SPON ADR						CUSIP 879382208	Symbol (Box 1d) TEF			
Sell	100 0000		08/23/12	12/20/13	1,579.66	1,275.52				304.14
Description (Box 8) VODAFONE GROUP PLC NEW SPON ADR						CUSIP 92857W209	Symbol (Box 1d) VOD			
Sell	65 0000		08/23/12	10/15/13	2,303 56	1,899 06				404 50
Sell	50 0000		08/23/12	11/19/13	1,854 97	1,460 81				394 16
Sub Total	115.0000				4,158.53	3,359.87				798.66
Description (Box 8) WISC ENERGY CORP						CUSIP 976657106	Symbol (Box 1d) WEC			
Sell	15 0000		08/23/12	11/19/13	637.19	574 65				62.54
Total	3,005.5130				$69,094.09	$61,653.51	$96.16			$7,536.74

continued next page

STATEMENT

UBS Financial Services Inc.
1000 Harbor Boulevard
Weehawken, NJ 07086-6790
Federal ID 13-2638166

Your Financial Advisor:
JASON HAMLIN & THE ARBOR GROUP
206-628-8511/800-426-7531

Payer:
THE MIZE FAMILY FOUNDATION
1463 E REPUBLICAN ST, #132
USPS #112
SEATTLE WA 98112-4517

2013 Informational Statement

Account Number: WI 38349 LI
Tax Identification Number: 27-1374636

Proceeds from Broker Transactions (continued)

Long-term transactions for noncovered securities, included in Box 2a

Activity type	Quantity / face value (Box 1a)	Original cost basis ($)	Date acquired (Box 1b)	Date of sale / exchange (Box 1c)	Sale amount (Box 2a) ($)	Cost or other basis (Box 3) ($)	Wash sale loss disallowed (Box 5) ($)	Federal income tax withheld (Box 4) ($)	Loss not allowed (Box 2b)	Gain/Loss ($)
Description (Box 8) APPLE INC					CUSIP 037833100	Symbol (Box 1d) AAPL				
Sell	5.0000		04/27/10	04/23/13	2,024.95	1,321 24				703 71
Description (Box 8) GENWORTH FINANCIAL INC 04 950% 100115 DTD091905 CALL@MW+15BP NTS					CUSIP 37247DAF3					
Redemption	15,000 0000		09/11/12	09/16/13	16,315 65	15,446.25				869.40
Description (Box 8) HCP INC					CUSIP 40414L109	Symbol (Box 1d) HCP				
Sell	10 0000		01/27/10	06/28/13	455 99	265.00				190.99
Description (Box 8) JOHNSON & JOHNSON COM					CUSIP 478160104	Symbol (Box 1d) JNJ				
Sell	35.0000		02/17/10	06/28/13	3,033 75	2,250.47				783.28
Description (Box 8) MICROSOFT CORP					CUSIP 594918104	Symbol (Box 1d) MSFT				
Sell	55.0000		03/12/10	06/28/13	1,889 22	1,609 25				279 97
Description (Box 8) SPDR GOLD TRUST					CUSIP 78463V107	Symbol (Box 1d) GLD				
Sell	20 0000		07/01/10	05/15/13	2,700 39	2,344 77				355 62
Sell	50 0000		07/16/10	05/15/13	6 750 96	5,814 54				936 42
Sub Total	70 0000				9,451.35	8,159 31				1,292 04
Description (Box 8) STARBUCKS CORP					CUSIP 855244109	Symbol (Box 1d) SBUX				
Sell	75 0000		03/30/10	06/28/13	4,913 16	1,843.43				3,069.73

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STATEMENT 17

Proceeds from Broker Transactions (continued)

Long-term transactions for noncovered securities, included in Box 2a (continued)

Activity type	Quantity / face value (Box 1e)	Original cost basis ($)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) ($)	Cost or other basis (Box 3) ($)	Wash sale loss disallowed (Box 5) ($)	Federal income tax withheld (Box 4) ($)	Loss not allowed (Box 2b)	Gain/Loss ($)
Description (Box 8) WALGREEN CO					CUSIP 931422109	Symbol (Box 1d) WAG				
Sell	10.0000		04/22/10	06/28/13	449.89	357.69				92.20
Description (Box 8) WHOLE FOODS MARKET INC					CUSIP 966837106	Symbol (Box 1d) WFM				
Sell	20.0000		04/22/10	06/28/13	1,031.38	393.49				637.89
Total	15,280.0000				$39,565.34	$31,646 13				$7,919.21

Term undetermined transactions for noncovered securities, included in Box 2a

Activity type	Quantity / face value (Box 1e)	Original cost basis ($)	Date acquired (Box 1b)	Date of sale / exchange (Box 1a)	Sale amount (Box 2a) ($)	Cost or other basis (Box 3) ($)	Wash sale loss disallowed (Box 5) ($)	Federal income tax withheld (Box 4) ($)	Loss not allowed (Box 2b)	Gain/Loss ($)
Description (Box 8) SPDR GOLD TRUST					CUSIP 78463V107	Symbol (Box 1d) GLD				
Return of Principal				01/07/13	3 68					Not Calculated
Return of Principal				02/2./13	3 80					Not Calculated
Return of Principal				03/12/13	3 69					Not Calculated
Return of Principal				04/09/13	3 78					Not Calculated
Return of Principal				05/10/13	3 90					Not Calculated
Sub Total					18 85					
Total					$18.85					
Total					$484,818 73					

STATEMENT 4