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Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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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 Oertly Suranata Family Foundation		A Employer identification number 27-7053502	
Number and street (or P O box number if mail is not delivered to street address) PO Box 1008		B Telephone number (see instructions) (802) 864-8000	
City or town, state or province, country, and ZIP or foreign postal code Quechee, VT 05059		C If exemption application is pending, check here ▶ <input type="checkbox"/>	
G Check all that apply <div><input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change</div> <div><input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change</div>		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)▶\$ 127,593		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ <input type="checkbox"/>	
J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)			

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)				
	2 Check ▶ <input type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities.	3,087	3,087		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10 	3,466			
	b Gross sales price for all assets on line 6a <u>13,335</u>				
	7 Capital gain net income (from Part IV , line 2) . . .		3,466		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	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	6,553	6,553		
	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule) 	7,171			
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule) 	3,569			
	17 Interest				
	18 Taxes (attach schedule) (see instructions)				
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)				
	24 Total operating and administrative expenses. Add lines 13 through 23	10,740	0		0
	25 Contributions, gifts, grants paid	7,000			7,000
	26 Total expenses and disbursements. Add lines 24 and 25	17,740	0		7,000
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-11,187			
	b Net investment income (if negative, enter -0-)		6,553		
	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	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments			
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	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)	91,972	86,491	127,593
	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)			
	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)	91,972	86,491	127,593	
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 ▶ <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	91,972		
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds		86,491	
	30	Total net assets or fund balances (see page 17 of the instructions)	91,972	86,491	
31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	91,972	86,491		

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	91,972
2	Enter amount from Part I, line 27a	2	-11,187
3	Other increases not included in line 2 (itemize) ▶ _____	3	5,706
4	Add lines 1, 2, and 3	4	86,491
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	86,491

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			(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	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	3,466
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	107

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	6,000	108,646	000 055225
2011	8,717	103,836	000 083950
2010			
2009			
2008			

2	Total of line 1, column (d).	2	000 139175
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	000 069588
4	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.	4	
5	Multiply line 4 by line 3.	5	
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	
7	Add lines 5 and 6.	7	
8	Enter qualifying distributions from Part XII, line 4. 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	8	

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 <input type="checkbox"/> and enter "N/A" on line 1		1	131	
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 type="checkbox"/> and enter 1% of Part I, line 27b		2	131	
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
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	131	
6 Credits/Payments		7		
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		
8 Enter any penalty for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached		8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	131	
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 Refunded		11		

Part VII-A Statements Regarding Activities

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	Yes	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) VT			
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	Yes	
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		No

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 Sarah R Oertly Telephone no (802) 295-1589 Located at PO Box 1008 Queechee VT ZIP +4 05059			
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		
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	Yes	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? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (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)? (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).			
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)? Organizations relying on a current notice regarding disaster assistance check here.	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		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? 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?			
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))?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(3) Provide a grant to an individual for travel, study, or other similar purposes?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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).		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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?		<input type="checkbox"/> Yes	<input type="checkbox"/> 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?		<input type="checkbox"/> Yes	<input type="checkbox"/> 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?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?		7b		

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
Rukiah S Oertly	President	0		
PO Box 1008	000 00			
Quechee, VT 05059				
Sarah R Oertly	Vice President	0		
PO Box 1008	000 00			
Quechee, VT 05059				
Sarah R Oertly	Secretary	0		
PO Box 1008	000 00			
Quechee, VT 05059				
Sarah R Oertly	Treasurer	0		
PO Box 1008	000 00			
Quechee, VT 05059				
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 this section is not applicable	0
2	
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 this section is not applicable	
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	
b	Average of monthly cash balances.	1b	
c	Fair market value of all other assets (see instructions).	1c	
d	Total (add lines 1a, b, and c).	1d	
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	
3	Subtract line 2 from line 1d.	3	
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	
6	Minimum investment return. Enter 5% of line 5.	6	

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	
2a	Tax on investment income for 2013 from Part VI, line 5.	2a	131
b	Income tax for 2013 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	131
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	131
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	131
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	-131

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 5	1a	7,000
b	Program-related investments—total from Part IX-B.	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	7,000
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions).	5	
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	7,000
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				-131
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only.				
b Total for prior years 20____, 20____, 20____				
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.				
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 7,000				
a Applied to 2012, but not more than line 2a				
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.				
e Remaining amount distributed out of corpus	7,000			
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	7,000			
b Prior years' undistributed income Subtract line 4b from line 2b.				
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				
e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount—see instructions				
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	7,000			
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. . . . 7,000				

Part XIVPrivate 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)

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	Tax year	Prior 3 years			(e) Total
		(a) 2013	(b) 2012	(c) 2011	(d) 2010	
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 XVSupplementary 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))

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

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 or e-mail address of the person to whom applications should be addressed

Sarah R Oertly
PO Box 1008
Queechee, VT 05059
(802) 295-1589

b

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

A letter, name of organization, FED ID , intent of use of funds, verification they are 501c3

c

Any submission deadlines

December 1st of calendar year

d

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

State of Vermont only and must be a 501c3

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

Form **990-PF** (2013)

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2013)

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 <u>www.irs.gov/form990</u>.	OMB No 1545-0047
		2013

Name of the organization Oertly Surianata Family Foundation	Employer identification number 27-7053502
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Organization type (check one)

Filers of:	Section:
Form 990 or 990-EZ	<input type="checkbox"/> 501(c)() (enter number) organization
	<input type="checkbox"/> 4947(a)(1) nonexempt charitable trust not treated as a private foundation
	<input type="checkbox"/> 527 political organization
Form 990-PF	<input checked="" type="checkbox"/> 501(c)(3) exempt private foundation
	<input type="checkbox"/> 4947(a)(1) nonexempt charitable trust treated as a private foundation
	<input type="checkbox"/> 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 33¹/₃% 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 Oertly Surianata Family Foundation	Employer identification number 27-7053502
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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
_____	<div></div> <div></div> <div></div> <div></div>	\$ <div></div>	<div>Person <input type="checkbox"/></div> <div>Payroll <input type="checkbox"/></div> <div>Noncash <input type="checkbox"/></div> <div>(Complete Part II for noncash contributions)</div>
_____	<div></div> <div></div> <div></div> <div></div>	\$ <div></div>	<div>Person <input type="checkbox"/></div> <div>Payroll <input type="checkbox"/></div> <div>Noncash <input type="checkbox"/></div> <div>(Complete Part II for noncash contributions)</div>
_____	<div></div> <div></div> <div></div> <div></div>	\$ <div></div>	<div>Person <input type="checkbox"/></div> <div>Payroll <input type="checkbox"/></div> <div>Noncash <input type="checkbox"/></div> <div>(Complete Part II for noncash contributions)</div>
_____	<div></div> <div></div> <div></div> <div></div>	\$ <div></div>	<div>Person <input type="checkbox"/></div> <div>Payroll <input type="checkbox"/></div> <div>Noncash <input type="checkbox"/></div> <div>(Complete Part II for noncash contributions)</div>
_____	<div></div> <div></div> <div></div> <div></div>	\$ <div></div>	<div>Person <input type="checkbox"/></div> <div>Payroll <input type="checkbox"/></div> <div>Noncash <input type="checkbox"/></div> <div>(Complete Part II for noncash contributions)</div>
_____	<div></div> <div></div> <div></div> <div></div>	\$ <div></div>	<div>Person <input type="checkbox"/></div> <div>Payroll <input type="checkbox"/></div> <div>Noncash <input type="checkbox"/></div> <div>(Complete Part II for noncash contributions)</div>
_____	<div></div> <div></div> <div></div> <div></div>	\$ <div></div>	<div>Person <input type="checkbox"/></div> <div>Payroll <input type="checkbox"/></div> <div>Noncash <input type="checkbox"/></div> <div>(Complete Part II for noncash contributions)</div>

Name of organization Oertly Surianata Family Foundation	Employer identification number 27-7053502
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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 Oertly Surianata Family Foundation	Employer identification number 27-7053502
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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
—	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
<div></div> <div></div>		<div></div> <div></div> <div></div>	

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
<div></div> <div></div>		<div></div> <div></div> <div></div>	

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
<div></div> <div></div>		<div></div> <div></div> <div></div>	

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
<div></div> <div></div>		<div></div> <div></div> <div></div>	

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)
4 Johnson Control Inc	P	2012-12-20	2013-02-01
7 Lowes Companies Inc	P	2013-02-04	2013-11-26
1 Aflac Inc	P	2011-08-11	2013-02-15
1 Aflac Inc	P	2011-08-11	2013-11-20
3 Aflac Inc	P	2011-08-11	2013-11-26
1 Air Products Chemicals Inc	P	2011-08-11	2013-11-20
2 Analog Devices Inc	P	2011-08-11	2013-11-20
4 Analog Devices Inc	P	2011-08-11	2013-11-26
2 A T T Inc	P	2011-08-11	2013-02-15
2 A T T Inc	P	2011-08-11	2013-11-20
4 A T T Inc	P	2011-08-11	2013-11-26
1 Automatic Data Processing	P	2011-08-11	2013-02-15
1 Automatic Data Processing	P	2011-08-11	2013-11-20
2 Automatic Data Processing	P	2011-08-11	2013-11-26
2 Baxter International Inc	P	2011-11-29	2013-11-20
1 Becton Dickinson Co	P	2011-08-11	2013-02-15
1 Becton Dickinson Co	P	2011-08-11	2013-11-20
1 Chevron Corporation	P	2011-08-11	2013-11-20
1 Chubb Corp	P	2011-11-23	2013-11-20
1 Clorox Company	P	2011-08-11	2013-02-15
1 Clorox Company	P	2011-08-11	2013-01-12
1 Colgate-Palmolive Co	P	2011-08-11	2013-02-15
1 Colgate-Palmolive Co	P	2011-08-11	2013-11-26
1 Conocophillips	P	2011-08-11	2013-11-20
2 Conocophillips	P	2011-08-11	2013-11-26
1 Eaton Vance Corp Non VTG	P	2011-08-11	2013-02-15
17 Eaton Vance Corp Non VTG	P	2011-08-11	2013-04-30
2 Eaton Vance Corp Non VTG	P	2011-08-11	2013-11-20
1 Emerson Electric Co	P	2011-08-11	2013-02-15
1 Emerson Electric Co	P	2011-08-11	2013-11-20

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)
2 Emerson Electric Co	P	2011-08-11	2013-11-26
1 Exxon Mobil Corp	P	2011-08-11	2013-11-20
2 Exxon Mobil Corp	P	2011-08-11	2013-11-26
1 Factset Research Systems Inc	P	2011-08-11	2013-11-20
1 General Mills Inc	P	2011-08-11	2013-02-15
4 General Mills Inc	P	2011-08-11	2013-11-26
1 Genl Dynamics Corp Com	P	2011-08-11	2013-02-15
1 Genl Dynamics Corp Com	P	2011-08-11	2013-11-20
1 Harris Corp Del	P	2011-08-11	2013-02-15
1 Harris Corp Del	P	2011-08-11	2013-11-20
2 Harris Corp Del	P	2011-08-11	2013-11-26
1 Illinois Tool Works Inc	P	2011-08-11	2013-02-15
1 Illinois Tool Works Inc	P	2011-08-11	2013-11-20
2 Illinois Tool Works Inc	P	2011-08-11	2013-11-26
1 International Business Machine Corp	P	2011-08-11	2013-11-20
1 J M Smucker Co	P	2011-08-11	2013-02-15
3 J M Smucker Co	P	2011-08-11	2013-11-26
1 Johnson Johnson	P	2011-08-11	2013-02-15
1 Johnson Johnson	P	2011-08-11	2013-11-20
65 Johnson Controls Inc	P	2011-08-11	2013-02-01
2 Kellogg Company	P	2012-03-01	2013-11-20
1 McDonalds Corp	P	2011-08-11	2013-11-20
1 Medtronic Inc	P	2011-12-23	2013-11-20
3 Medtronic Inc	P	2011-12-23	2013-11-26
5 Microsoft Corp	P	2012-02-17	2013-01-12
3 Microsoft Corp	P	2012-02-17	2013-11-26
1 Nextera Energy INc	P	2011-08-11	2013-02-15
1 Nextera Energy Inc	P	2011-08-11	2013-11-20
2 Nordstrom Inc	P	2011-08-11	2013-01-12
2 NOrdstrom Inc	P	2011-08-11	2013-11-26

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)
1 Norfolk Southern Corp	P	2011-08-11	2013-02-15
1 Norfolk Souther Corp	P	2011-08-11	2013-11-20
1 Northeast Utilities	P	2011-08-11	2013-02-15
2 Northeast Utilities	P	2011-08-11	2013-11-20
2 Northeast Utilities	P	2011-08-11	2013-11-26
1 Novartis Ag Spon Adr	P	2011-08-11	2013-02-15
1 Novartis Ag Spon Adr	P	2011-08-11	2013-11-20
2 Novartis Ag Spon Adr	P	2011-08-11	2013-11-26
1 Paychex Inc	P	2011-08-11	2013-02-15
2 Paychex Inc	P	2011-08-11	2013-11-20
3 Paychex Inc	P	2011-08-11	2013-11-26
1 Pepsico Incorporated	P	2011-08-11	2013-02-15
1 Pepsico Incorporated	P	2011-08-11	2013-11-20
1 Phillips 66	P	2011-08-11	2013-11-20
2 Phillips 66	P	2011-08-11	2013-11-26
1 Polaris Inds Inc	P	2011-08-11	2013-02-15
2 Polaris Inds Inc	P	2011-08-11	2013-11-26
1 Praxair Inc	P	2011-08-11	2013-11-20
1 Procter Gamble Co	P	2011-08-11	2013-11-20
2 Procter Gamble Co	P	2011-08-11	2013-11-26
1 Scana Corp Com	P	2011-08-11	2013-02-15
1 Sigma Aldrich Corp	P	2011-08-11	2013-02-15
1 Sigma Aldrich Corp	P	2011-08-11	2013-11-20
1 Sysco Corporation	P	2011-08-11	2013-02-15
2 Sysco Corporation	P	2011-08-11	2013-11-20
3 Sysco Corporation	P	2011-08-11	2013-11-26
2 Target Corp	P	2011-08-11	2013-11-20
2 Target Corp	P	2011-08-11	2013-11-26
1 The Southern Company	P	2011-08-11	2013-11-20
3 The Southern Company	P	2011-08-11	2013-11-26

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)
1 United Technologies Corp	P	2011-08-11	2013-02-15
2 United Technologies Corp	P	2011-08-11	2013-11-26
1 V F Corporation	P	2011-08-11	2013-02-15
1 Wal-Mart Stores Inc	P	2011-08-11	2013-11-20
2 Wal-Mart Stores Inc	P	2011-08-11	2013-11-26
1 Wisconsin Energy Corp	P	2012-06-22	2013-11-20
1 3M Co	P	2011-08-11	2013-02-15
2 3M Co	P	2011-08-11	2013-11-26

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)
125		119	6
338		268	70
49		36	13
66		36	30
200		109	91
109		80	29
99		62	37
200		125	75
71		56	15
71		56	15
142		112	30
61		46	15
80		46	34
161		93	68
138		99	39
88		77	11
109		77	32
122		93	29
95		64	31
82		67	15
93		67	26
110		83	27
133		83	50
73		49	24
146		99	47
41		23	18
673		394	279
86		46	40
58		44	14
67		44	23

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)
135		88	47
95		70	25
189		141	48
113		82	31
44		35	9
201		141	60
66		61	5
90		61	29
48		36	12
64		36	28
129		72	57
64		44	20
79		44	35
159		88	71
186		166	20
93		73	20
316		220	96
76		62	14
95		62	33
2,034		2,030	4
123		105	18
98		86	12
57		38	19
172		113	59
187		156	31
113		93	20
72		52	20
87		52	35
125		83	42
126		83	43

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)
71		68	3
86		68	18
41		32	9
84		64	20
83		64	19
69		54	15
79		54	25
159		109	50
34		26	8
87		52	35
131		79	52
73		62	11
86		62	24
67		29	38
138		59	79
86		47	39
268		94	174
125		95	30
85		60	25
171		119	52
48		37	11
77		60	17
86		60	26
32		29	3
67		57	10
135		114	21
133		95	38
128		95	33
42		39	3
123		117	6

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)
90		69	21
222		139	83
158		106	52
79		50	29
161		99	62
42		39	3
103		80	23
264		161	103

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	
			6
			70
			13
			30
			91
			29
			37
			75
			15
			15
			30
			15
			34
			68
			39
			11
			32
			29
			31
			15
			26
			27
			50
			24
			47
			18
			279
			40
			14
			23

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	
			47
			25
			48
			31
			9
			60
			5
			29
			12
			28
			57
			20
			35
			71
			20
			20
			96
			14
			33
			4
			18
			12
			19
			59
			31
			20
			20
			35
			42
			43

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	
			3
			18
			9
			20
			19
			15
			25
			50
			8
			35
			52
			11
			24
			38
			79
			39
			174
			30
			25
			52
			11
			17
			26
			3
			10
			21
			38
			33
			3
			6

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	
			21
			83
			52
			29
			62
			3
			23
			103

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

TY 2013 Gain/Loss from Sale of Other Assets Schedule

Name: Oertly Suranata Family Foundation

EIN: 27-7053502

Software ID: 13000230

Software Version: 13.4.0.0

Name	Date Acquired	How Acquired	Date Sold	Purchaser Name	Gross Sales Price	Basis	Basis Method	Sales Expenses	Total (net)	Accumulated Depreciation
4 Johnson Control Inc	2012-12	P	2013-02	Wells Fargo Advisors	125	119	Market		6	
7 Lowes Companies Inc	2013-02	P	2013-11	Wells Fargo Advisors	338	268	Market		70	
1 Aflac Inc	2011-08	P	2013-02	Wells Fargo Advisors	49	36	Market		13	
1 Aflac Inc	2011-08	P	2013-11	Wells Fargo Advisors	66	36	Market		30	
3 Aflac Inc	2011-08	P	2013-11	Wells Fargo Advisors	200	109	Market		91	
1 Air Products Chemicals Inc	2011-08	P	2013-11	Wells Fargo Advisors	109	80	Market		29	
2 Analog Devices Inc	2011-08	P	2013-11	Wells Fargo Advisors	99	62	Market		37	
4 Analog Devices Inc	2011-08	P	2013-11	Wells Fargo Advisors	200	125	Market		75	
2 A T T Inc	2011-08	P	2013-02	Wells Fargo Advisors	71	56	Market		15	
2 A T T Inc	2011-08	P	2013-11	Wells Fargo Advisors	71	56	Market		15	
4 A T T Inc	2011-08	P	2013-11	Wells Fargo Advisors	142	112	Market		30	
1 Automatic Data Processing	2011-08	P	2013-02	Wells Fargo Advisors	61	46	Market		15	
1 Automatic Data Processing	2011-08	P	2013-11	Wells Fargo Advisors	80	46	Market		34	
2 Automatic Data Processing	2011-08	P	2013-11	Wells Fargo Advisors	161	93	Market		68	
2 Baxter International Inc	2011-11	P	2013-11	Wells Fargo Advisors	138	99	Market		39	
1 Becton Dickinson Co	2011-08	P	2013-02	Wells Fargo Advisors	88	77	Market		11	
1 Becton Dickinson Co	2011-08	P	2013-11	Wells Fargo Advisors	109	77	Market		32	
1 Chevron Corporation	2011-08	P	2013-11	Wells Fargo Advisors	122	93	Market		29	
1 Chubb Corp	2011-11	P	2013-11	Wells Fargo Advisors	95	64	Market		31	
1 Clorox Company	2011-08	P	2013-02	Wells Fargo Advisors	82	67	Market		15	
1 Clorox Company	2011-08	P	2013-01	Wells Fargo Advisors	93	67	Market		26	
1 Colgate-Palmolive Co	2011-08	P	2013-02	Wells Fargo Advisors	110	83	Market		27	
1 Colgate-Palmolive Co	2011-08	P	2013-11	Wells Fargo Advisors	133	83	Market		50	
1 Conocophillips	2011-08	P	2013-11	Wells Fargo Advisors	73	49	Market		24	
2 Conocophillips	2011-08	P	2013-11	Wells Fargo Advisors	146	99	Market		47	
1 Eaton Vance Corp Non VTG	2011-08	P	2013-02	Wells Fargo Advisors	41	23	Market		18	
17 Eaton Vance Corp Non VTG	2011-08	P	2013-04	Wells Fargo Advisors	673	394	Market		279	
2 Eaton Vance Corp Non VTG	2011-08	P	2013-11	Wells Fargo Advisors	86	46	Market		40	
1 Emerson Electric Co	2011-08	P	2013-02	Wells Fargo Advisors	58	44	Market		14	
1 Emerson Electric Co	2011-08	P	2013-11	Wells Fargo Advisors	67	44	Market		23	

Name	Date Acquired	How Acquired	Date Sold	Purchaser Name	Gross Sales Price	Basis	Basis Meth od	Sales Expenses	Total (net)	Accumulated Depreciation
2 Emerson Electric Co	2011-08	P	2013-11	Wells Fargo Advisors	135	88	Market		47	
1 Exxon Mobil Corp	2011-08	P	2013-11	Wells Fargo Advisors	95	70	Market		25	
2 Exxon Mobil Corp	2011-08	P	2013-11	Wells Fargo Advisors	189	141	Market		48	
1 Factset Research Systems Inc	2011-08	P	2013-11	Wells Fargo Advisors	113	82	Market		31	
1 General Mills Inc	2011-08	P	2013-02	Wells Fargo Advisors	44	35	Market		9	
4 General Mills Inc	2011-08	P	2013-11	Wells Fargo Advisors	201	141	Market		60	
1 Genl Dynamics Corp Com	2011-08	P	2013-02	Wells Fargo Advisors	66	61	Market		5	
1 Genl Dynamics Corp Com	2011-08	P	2013-11	Wells Fargo Advisors	90	61	Market		29	
1 Harris Corp Del	2011-08	P	2013-02	Wells Fargo Advisors	48	36	Market		12	
1 Harris Corp Del	2011-08	P	2013-11	Wells Fargo Advisors	64	36	Market		28	
2 Harris Corp Del	2011-08	P	2013-11	Wells Fargo Advisors	129	72	Market		57	
1 Illinois Tool Works Inc	2011-08	P	2013-02	Wells Fargo Advisors	64	44	Market		20	
1 Illinois Tool Works Inc	2011-08	P	2013-11	Wells Fargo Advisors	79	44	Market		35	
2 Illinois Tool Works Inc	2011-08	P	2013-11	Wells Fargo Advisors	159	88	Market		71	
1 International Business Machine Corp	2011-08	P	2013-11	Wells Fargo Advisors	186	166	Market		20	
1 J M Smucker Co	2011-08	P	2013-02	Wells Fargo Advisors	93	73	Market		20	
3 J M Smucker Co	2011-08	P	2013-11	Wells Fargo Advisors	316	220	Market		96	
1 Johnson Johnson	2011-08	P	2013-02	Wells Fargo Advisors	76	62	Market		14	
1 Johnson Johnson	2011-08	P	2013-11	Wells Fargo Advisors	95	62	Market		33	
65 Johnson Controls Inc	2011-08	P	2013-02	Wells Fargo Advisors	2,034	2,030	Market		4	
2 Kellogg Company	2012-03	P	2013-11	Wells Fargo Advisors	123	105	Market		18	
1 McDonalds Corp	2011-08	P	2013-11	Wells Fargo Advisors	98	86	Market		12	
1 Medtronic Inc	2011-12	P	2013-11	Wells Fargo Advisors	57	38	Market		19	
3 Medtronic Inc	2011-12	P	2013-11	Wells Fargo Advisors	172	113	Market		59	
5 Microsoft Corp	2012-02	P	2013-01	Wells Fargo Advisors	187	156	Market		31	
3 Microsoft Corp	2012-02	P	2013-11	Wells Fargo Advisors	113	93	Market		20	
1 Nextera Energy INc	2011-08	P	2013-02	Wells Fargo Advisors	72	52	Market		20	
1 Nextera Energy Inc	2011-08	P	2013-11	Wells Fargo Advisors	87	52	Market		35	
2 Nordstrom Inc	2011-08	P	2013-01	Wells Fargo Advisors	125	83	Market		42	
2 NOrdstrom Inc	2011-08	P	2013-11	Wells Fargo Advisors	126	83	Market		43	

Name	Date Acquired	How Acquired	Date Sold	Purchaser Name	Gross Sales Price	Basis	Basis Method	Sales Expenses	Total (net)	Accumulated Depreciation
1 Norfolk Southern Corp	2011-08	P	2013-02	Wells Fargo Advisors	71	68	Market		3	
1 Norfolk Souther Corp	2011-08	P	2013-11	Wells Fargo Advisors	86	68	Market		18	
1 Northeast Utilities	2011-08	P	2013-02	Wells Fargo Advisors	41	32	Market		9	
2 Northeast Utilities	2011-08	P	2013-11	Wells Fargo Advisors	84	64	Market		20	
2 Northeast Utilities	2011-08	P	2013-11	Wells Fargo Advisors	83	64	Market		19	
1 Novartis Ag Spon Adr	2011-08	P	2013-02	Wells Fargo Advisors	69	54	Market		15	
1 Novartis Ag Spon Adr	2011-08	P	2013-11	Wells Fargo Advisors	79	54	Market		25	
2 Novartis Ag Spon Adr	2011-08	P	2013-11	Wells Fargo Advisors	159	109	Market		50	
1 Paychex Inc	2011-08	P	2013-02	Wells Fargo Advisors	34	26	Market		8	
2 Paychex Inc	2011-08	P	2013-11	Wells Fargo Advisors	87	52	Market		35	
3 Paychex Inc	2011-08	P	2013-11	Wells Fargo Advisors	131	79	Market		52	
1 Pepsico Incorporated	2011-08	P	2013-02	Wells Fargo Advisors	73	62	Market		11	
1 Pepsico Incorporated	2011-08	P	2013-11	Wells Fargo Advisors	86	62	Market		24	
1 Phillips 66	2011-08	P	2013-11	Wells Fargo Advisors	67	29	Market		38	
2 Phillips 66	2011-08	P	2013-11	Wells Fargo Advisors	138	59	Market		79	
1 Polaris Inds Inc	2011-08	P	2013-02	Wells Fargo Advisors	86	47	Market		39	
2 Polaris Inds Inc	2011-08	P	2013-11	Wells Fargo Advisors	268	94	Market		174	
1 Praxair Inc	2011-08	P	2013-11	Wells Fargo Advisors	125	95	Market		30	
1 Procter Gamble Co	2011-08	P	2013-11	Wells Fargo Advisors	85	60	Market		25	
2 Procter Gamble Co	2011-08	P	2013-11	Wells Fargo Advisors	171	119	Market		52	
1 Scana Corp Com	2011-08	P	2013-02	Wells Fargo Advisors	48	37	Market		11	
1 Sigma Aldrich Corp	2011-08	P	2013-02	Wells Fargo Advisors	77	60	Market		17	
1 Sigma Aldrich Corp	2011-08	P	2013-11	Wells Fargo Advisors	86	60	Market		26	
1 Sysco Corporation	2011-08	P	2013-02	Wells Fargo Advisors	32	29	Market		3	
2 Sysco Corporation	2011-08	P	2013-11	Wells Fargo Advisors	67	57	Market		10	
3 Sysco Corporation	2011-08	P	2013-11	Wells Fargo Advisors	135	114	Market		21	
2 Target Corp	2011-08	P	2013-11	Wells Fargo Advisors	133	95	Market		38	
2 Target Corp	2011-08	P	2013-11	Wells Fargo Advisors	128	95	Market		33	
1 The Southern Company	2011-08	P	2013-11	Wells Fargo Advisors	42	39	Market		3	
3 The Southern Company	2011-08	P	2013-11	Wells Fargo Advisors	123	117	Market		6	

Name	Date Acquired	How Acquired	Date Sold	Purchaser Name	Gross Sales Price	Basis	Basis Method	Sales Expenses	Total (net)	Accumulated Depreciation
1 United Technologies Corp	2011-08	P	2013-02	Wells Fargo Advisors	90	69	Market		21	
2 United Technologies Corp	2011-08	P	2013-11	Wells Fargo Advisors	222	139	Market		83	
1 V F Corporation	2011-08	P	2013-02	Wells Fargo Advisors	158	106	Market		52	
1 Wal-Mart Stores Inc	2011-08	P	2013-11	Wells Fargo Advisors	79	50	Market		29	
2 Wal-Mart Stores Inc	2011-08	P	2013-11	Wells Fargo Advisors	161	99	Market		62	
1 Wisconsin Energy Corp	2012-06	P	2013-11	Wells Fargo Advisors	42	39	Market		3	
1 3M Co	2011-08	P	2013-02	Wells Fargo Advisors	103	80	Market		23	
2 3M Co	2011-08	P	2013-11	Wells Fargo Advisors	264	161	Market		103	

TY 2013 General Explanation Attachment

Name: Oertly Suranata Family Foundation

EIN: 27-7053502

Software ID: 13000230

Software Version: 13.4.0.0

**TY 2013 Investments Corporate
Stock Schedule**

Name: Oertly Surianata Family Foundation

EIN: 27-7053502

Software ID: 13000230

Software Version: 13.4.0.0

Name of Stock	End of Year Book Value	End of Year Fair Market Value
Stocks see list	86,491	127,593

TY 2013 Legal Fees Schedule

Name: Oertly Suranata Family Foundation

EIN: 27-7053502

Software ID: 13000230

Software Version: 13.4.0.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Paul Frank Collins Attorneys at Law	7,171			

TY 2013 Other Increases Schedule

Name: Oertly Suranata Family Foundation

EIN: 27-7053502

Software ID: 13000230

Software Version: 13.4.0.0

Description	Amount
Unexplained	5,706

TY 2013 Other Professional Fees Schedule

Name: Oertly Suranata Family Foundation

EIN: 27-7053502

Software ID: 13000230

Software Version: 13.4.0.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Wells Fargo Advisors -- Advisory Fees	1,791			
Income Tax Preparation Fee	1,778			

TY 2013 Substantial Contributors Schedule

Name: Oertly Suranata Family Foundation

EIN: 27-7053502

Software ID: 13000230

Software Version: 13.4.0.0

Name	Address
Rukiah S Oertly	PO Box 1008 Queechee, VT 05059

TY 2013 Taxes Schedule

Name: Oertly Suranata Family Foundation

EIN: 27-7053502

Software ID: 13000230

Software Version: 13.4.0.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
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