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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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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 THE GEORGE H SCANLON FOUNDATION		A Employer identification number 42-6100764	
Number and street (or P O box number if mail is not delivered to street address) PO BOX 323		B Telephone number (see instructions) (617) 734-0446	
City or town, state or province, country, and ZIP or foreign postal code OKOBOJI, IA 51355		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 ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 3,959,063	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)				
	2 Check ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	34,131	34,131		
	4 Dividends and interest from securities.	76,425	76,425		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	955,505			
	b Gross sales price for all assets on line 6a 2,914,382				
	7 Capital gain net income (from Part IV, line 2) . . .		955,505		
	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	1,066,061	1,066,061		
	13 Compensation of officers, directors, trustees, etc	12,000	6,000		6,000
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)	30	15		15
	b Accounting fees (attach schedule)	4,825	2,413		2,412
	c Other professional fees (attach schedule)	44,798	44,798		0
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	598	598		0
	19 Depreciation (attach schedule) and depletion . . .	183	0		
	20 Occupancy				
	21 Travel, conferences, and meetings	13,221	0		13,221
	22 Printing and publications				
	23 Other expenses (attach schedule)	240	30		0
	24 Total operating and administrative expenses. Add lines 13 through 23	75,895	53,854		21,648
	25 Contributions, gifts, grants paid	163,400			163,400
	26 Total expenses and disbursements. Add lines 24 and 25	239,295	53,854		185,048
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	826,766			
	b Net investment income (if negative, enter -0-)		1,012,207		
	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			505,052	82,185	82,185
	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)			1,776,054	 2,658,784	2,874,526
	c	Investments—corporate bonds (attach schedule).			564,029	 562,233	544,120
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____					
	12	Investments—mortgage loans					
	13	Investments—other (attach schedule)			33,000	 433,025	457,957
	14	Land, buildings, and equipment basis ▶ _____ 1,592 Less accumulated depreciation (attach schedule) ▶ 1,317			458	 275	275
	15	Other assets (describe ▶ _____)					
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)			2,878,593	3,736,502	3,959,063
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	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			0	0	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			0	0	
	29	Retained earnings, accumulated income, endowment, or other funds			2,878,593	3,736,502	
	30	Total net assets or fund balances (see page 17 of the instructions)			2,878,593	3,736,502	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)			2,878,593	3,736,502	

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	2,878,593
2	Enter amount from Part I, line 27a	2	826,766
3	Other increases not included in line 2 (itemize) ▶ 	3	31,143
4	Add lines 1, 2, and 3	4	3,736,502
5	Decreases not included in line 2 (itemize) ▶ _____	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	3,736,502

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)
1 a	PUBLICLY TRADED SECURITIES	P		
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 2,914,382		1,958,877	955,505
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(I) 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			955,505
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	955,505
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	158,155	3,942,427	0 040116
2011	246,211	4,142,675	0 059433
2010	199,264	3,828,893	0 052042
2009	191,925	3,309,343	0 057995
2008	185,807	3,796,467	0 048942

2	Total of line 1, column (d).	2	0 258528
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 051706
4	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.	4	3,958,621
5	Multiply line 4 by line 3.	5	204,684
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	10,122
7	Add lines 5 and 6.	7	214,806
8	Enter qualifying distributions from Part XII, line 4.	8	185,048

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	20,244
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0
3 Add lines 1 and 2.	3	20,244
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	20,244
6 Credits/Payments		
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	2,590
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	2,590
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	17,654
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)? <i>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.</i>	1b		No
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? <i>If "Yes," attach a detailed description of the activities.</i>	2		No
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? <i>If "Yes," attach a conformed copy of the changes</i>	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? <i>If "Yes," attach the statement required by General Instruction T.</i>	5		No
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? <i>If "Yes," complete Part II, col. (c), and Part XV.</i>	7	Yes	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☐ IA _____			
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? <i>If "No," attach explanation.</i>	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)? <i>If "Yes," complete Part XIV</i>	9		No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>	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 ▶N/A				
14	The books are in care of ▶ROBERT DOWNER Telephone no ▶(319) 338-9222 Located at ▶122 S LINN ST IOWA CITY IA ZIP +4 ▶52240			
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? ☐ 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)?. . . Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐	1b		No
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? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013.</i>).	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		

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
CLARKE W SCANLON	PRESIDENT	0	0	0
PO BOX 323 OKOBOJI,IA 51355	1 00			
JAMES P SCANLON JR	TREASURER	12,000	0	0
PO BOX 323 OKOBOJI,IA 51355	15 00			
JANE A SCANLON	SECRETARY	0	0	0
PO BOX 323 OKOBOJI,IA 51355	1 00			
MARCIA E SCANLON	VICE PRESIDENT	0	0	0
PO BOX 323 OKOBOJI,IA 51355	1 00			
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
NONE				
Total number of other employees paid over \$50,000.				0

Part VIII

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

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services.		0

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	
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	
2	
All other program-related investments. See page 24 of the instructions	
3	
Total. Add lines 1 through 3	0

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	3,273,228
b	Average of monthly cash balances.	1b	712,677
c	Fair market value of all other assets (see instructions).	1c	33,000
d	Total (add lines 1a, b, and c).	1d	4,018,905
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	4,018,905
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	60,284
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	3,958,621
6	Minimum investment return. Enter 5% of line 5.	6	197,931

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	197,931
2a	Tax on investment income for 2013 from Part VI, line 5.	2a	20,244
b	Income tax for 2013 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	20,244
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	177,687
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	177,687
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	177,687

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	185,048
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	
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	185,048
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	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	185,048
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				177,687
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2013				
a From 2008.				
b From 2009.	28,348			
c From 2010.	11,793			
d From 2011.	42,871			
e From 2012.				
f Total of lines 3a through e.	83,012			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 185,048				
a Applied to 2012, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2013 distributable amount.				177,687
e Remaining amount distributed out of corpus	7,361			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	90,373			
b Prior years' undistributed income Subtract line 4b from line 2b.		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount—see 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).	0			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions). . .	0			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	90,373			
10 Analysis of line 9				
a Excess from 2009. . . .	28,348			
b Excess from 2010. . . .	11,793			
c Excess from 2011. . . .	42,871			
d Excess from 2012. . . .				
e Excess from 2013. . . .	7,361			

Part XIV

4942(j)(3) or 4942(j)(5)

3 Complete 3a, b, or c for the alternative test relied upon

Part XV

1

• 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

other conditions, complete items 2a, b, c, and d

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

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	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	163,400
b Approved for future payment				
Total			3b	0

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2013)

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
ANIMAL PROTECTIVE ASSOCIATION DBA HARMONY HOUSE FOR CATS PO BOX 18098 CHICAGO,IL 60618	NONE	PC	GENERAL OPERATING BUDGET	1,030
BEDELL FAMILY YMCA 1900 41ST ST SPIRIT LAKE,IA 51360	NONE	PC	GENERAL OPERATING BUDGET	500
BOSTON SYMPHONY ORCHESTRA INC 301 MASSACHUSETTS AVE BOSTON,MA 02115	NONE	PC	GENERAL OPERATING BUDGET	150
BROOKLINE EDUCATION FOUNDATION PO BOX 470652 BROOKLINE,MA 02447	NONE	PC	GENERAL OPERATING BUDGET	400
BROOKLINE TEEN CENTER 40 WEBSTER PL BROOKLINE,MA 02245	NONE	PC	GENERAL OPERATING BUDGET	650
CAMP HARBOR VIEW FOUNDATION 2 DEARBORN ST BOSTON,MA 02119	NONE	PC	GENERAL OPERATING BUDGET	250
CANINE COMPANIONS FOR INDEPENDENCE PO BOX 446 SANTA ROSA,CA 65402	NONE	PC	GENERAL OPERATING BUDGET	2,000
CHILDREN'S HOSPITAL BOSTON 300 LONGWOOD AVE BOSTON,MA 02115	NONE	PC	PATIENT FAMILY HOUSING	42,000
CHRISTMAS IN THE CITY 160 FEDERAL ST FL 15 BOSTON,MA 02110	NONE	PC	GENERAL OPERATING BUDGET	250
CHURCH OF OUR SAVIOUR 25 MONMOUTH ST BROOKLINE,MA 02446	NONE	PC	GENERAL OPERATING BUDGET	500
CONTEMPORARY ARTS CENTER 44 E SIXTH ST CINCINNATI,OH 45202	NONE	PC	GENERAL OPERATING BUDGET	65
DAVID LYNCH FOUNDATION FOR CONSCIOUSNESS BASED EDUCATION 1000 NORTH FOURTH FAIRFIELD,IA 52557	NONE	PC	GENERAL OPERATING BUDGET	2,000
ISABELLA STEWART GARDNER MUSEUM 280 THE FENWAY BOSTON,MA 02138	NONE	PC	GENERAL OPERATING BUDGET	500
JOHNSON COUNTY COMMUNITY FOUNDATION 325 E WASHINGTON ST IOWA CITY,IA 52240	NONE	PC	GENERAL OPERATING BUDGET	5,000
LAWRENCE SCHOOL PTO 27 FRANCIS ST BROOKLINE,MA 02446	NONE	PC	GENERAL OPERATING BUDGET	500
Total  3a				163,400

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
LOS ANGELES COUNTY MUSEUM OF ART 5905 WILSHIRE BLVD LOS ANGELES,CA 90036	NONE	PC	GENERAL OPERATING BUDGET	100
MEALS ON WHEELS 203 S UNION ST ALEXANDRIA,VA 22314	NONE	PC	GENERAL OPERATING BUDGET	2,000
MIDWEST LUMBER MUSEUM 1301 19TH AVE NW CLINTON,IA 52732	NONE	PC	GENERAL OPERATING BUDGET	2,000
MUSEUM OF CONTEMPORARY ART (MOCA) 250 S GRAND AVENUE LOS ANGELES,CA 90012	NONE	PC	GENERAL OPERATING BUDGET	147
MUSEUM OF FINE ARTS 465 HUNTINGTON AVENUE BOSTON,MA 02115	NONE	PC	GENERAL OPERATING BUDGET	250
MUSEUM OF SCIENCE 1 SCIENCE PARK BOSTON,MA 02210	NONE	PC	GENERAL OPERATING BUDGET	160
NATURAL RESOURCES DEFENSE COUNCIL INC (NRDC) 40 WEST 20TH STREET NEW YORK,NY 10011	NONE	PC	GENERAL OPERATING BUDGET	1,600
NEW ENGLAND WHEELCHAIR SPORTS INC 20 HAVEN STREET DOVER,MA 02030	NONE	PC	GENERAL OPERATING BUDGET	500
NEW ENGLAND WILD FLOWER SOCIETY 180 HEMENWAY ROAD FRAMINGHAM,MA 01701	NONE	PC	GENERAL OPERATING BUDGET	75
NEWMAN CATHOLIC STUDENT CENTER 104 EAST JEFFERSON STREET IOWA CITY,IA 52245	NONE	PC	GENERAL OPERATING BUDGET	250
NORTH LIBERTY COMMUNITY FOUNDATION (COMMUNITY FOUNDATION OF JOHNSON COUNTY) 325 E WASHINGTON ST IOWA CITY,IA 52240	NONE	PC	GENERAL OPERATING BUDGET	14,000
NORTH SHORE ANIMAL LEAGUE 25 DAVIS AVENUE PORT WASHINGTON,NY 11050	NONE	PC	GENERAL OPERATING BUDGET	2,000
NORTHWESTERN ARTHRITIS & REHABILITATION INSTITUTE - OPERATION WALK CHICAGO 680 N LAKE SHORE DRIVE CHICAGO,IL 60611	NONE	PC	GENERAL OPERATING BUDGET	23,000
OCEANA INC 2501 M ST NW WASHINGTON,DC 20037	NONE	PC	GENERAL OPERATING BUDGET	20,000
OKOBOJI FOUNDATION ENDOWMENT (COMMUNITY FOUNDATION OF GREATER DES MOINES) PO BOX 593 OKOBOJI,IA 51355	NONE	PC	GENERAL OPERATING BUDGET	1,000
Total  3a				163,400

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
OLD STURBRIDGE VILLAGE 1 OLD STURBRIDGE VILLAGE STURBRIDGE,MA 01566	NONE	PC	GENERAL OPERATING BUDGET	90
OTIS COLLEGE OF ART AND DESIGN 9045 LINCOLN BOULEVARD LOS ANGELES,CA 90045	NONE	PC	GENERAL OPERATING BUDGET	8,950
PEOPLE FOR THE ETHICAL TREATMENT OF ANIMALS (PETA) 500 FRONT STREET NORFOLK,VA 23510	NONE	PC	GENERAL OPERATING BUDGET	405
RONALD REAGAN PRESIDENTIAL FOUNDATION 40 PRESIDENTIAL DR STE 200 SIMI VALLEY,CA 93065	NONE	PC	GENERAL OPERATING BUDGET	65
SEED FOUNDATION 1776 MASSACHUSETTS AVENUE NW SUITE 600 WASHINGTON,DC 20036	NONE	PC	GENERAL OPERATING BUDGET	200
SPECIAL OLYMPICS 1133 19TH ST NW WASHINGTON,DC 20036	NONE	PC	GENERAL OPERATING BUDGET	500
STEPPENWOLF THEATRE COMPANY 1650 HALSTED ST CHICAGO,IL 60601	NONE	PC	GENERAL OPERATING BUDGET	1,000
THE EPIPHANY SCHOOL 154 CENTRE STREET DORCHESTER,MA 02124	NONE	PC	GENERAL OPERATING BUDGET	500
UNIVERSITY OF ILLINOIS AT CHICAGO 601 S MORGAN ST CHICAGO,IL 60607	NONE	PC	GENERAL OPERATING BUDGET	450
UNIVERSITY OF IOWA FOUNDATION PO BOX 4550 IOWA CITY,IA 52244	NONE	PC	GENERAL OPERATING BUDGET	28,000
WOMEN FOR WOMEN INTERNATIONAL 1850 M STREET WASHINGTON,DC 20008	NONE	PC	GENERAL OPERATING BUDGET	113
YOGA REACHES OUT PO BOX 5352 WAYLAND,MA 01778	NONE	PC	GENERAL OPERATING BUDGET	250
Total  3a				163,400

TY 2013 Accounting Fees Schedule

Name: THE GEORGE H SCANLON FOUNDATION

EIN: 42-6100764

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	4,825	2,413		2,412

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

TY 2013 Depreciation Schedule

Name: THE GEORGE H SCANLON FOUNDATION

EIN: 42-6100764

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
COMPUTER	2010-08-20	1,592	1,134	200DB	5 000000000000	183	0		

**TY 2013 Investments Corporate
Bonds Schedule****Name:** THE GEORGE H SCANLON FOUNDATION**EIN:** 42-6100764

Name of Bond	End of Year Book Value	End of Year Fair Market Value
ALCOA INC	106,231	106,545
AVON PRODUCTS INC	52,682	53,785
DUN & BRADSTREET CORP	100,404	96,412
GENERAL ELECTRIC CAPITAL CORP	99,000	93,765
MONTPELIER RE HLDGS	102,557	98,120
OWENS CORNING	101,359	95,493

TY 2013 Investments Corporate Stock Schedule

Name: THE GEORGE H SCANLON FOUNDATION

EIN: 42-6100764

Name of Stock	End of Year Book Value	End of Year Fair Market Value
ABBVIE INC COM	121,483	132,025
APPLE INC	89,769	137,762
BCE INC COM NPV	86,405	87,423
COMCAST CORP	100,000	82,560
CONOCOPHILLIPS	105,188	106,977
DEERE & COMPANY	130,417	136,995
DTE ENERGY HOLDING CO	29,193	116,516
GENERAL MOTORS CO COM	122,670	122,610
GOLDMAN SACHS GROUP INC DEP SHS	102,371	90,000
ISHARES FUNDS	345,291	440,650
JPMORGAN CHASE & CO DEPOSITARY SHS	25,000	20,280
MANITOWOC INC	80,034	93,639
MICROSOFT CORP	75,439	74,820
NOVARTIS AG ADR-EACH REPR	115,067	120,570
PIMCO INCOME STRATEGY FD II	246,762	210,143
ROCHE HOLDINGS AG SPN ADR EACH REP	101,231	105,076
SANOFI SPONSORED ADR	101,130	107,260
SEADRILL LTD	97,699	85,796
TORTOISE MLP FUND INC COM	400,286	393,840
VANGUARD FUNDS	90,846	110,283
VERIZON COMMUNICATIONS	92,503	99,301

TY 2013 Investments - Other Schedule

Name: THE GEORGE H SCANLON FOUNDATION

EIN: 42-6100764

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
MAINGATE MLP FUND	AT COST	400,025	424,957
PRIVATELY HELD STOCK	AT COST	33,000	33,000

TY 2013 Land, Etc. Schedule

Name: THE GEORGE H SCANLON FOUNDATION

EIN: 42-6100764

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
COMPUTER	1,592	1,317	275	

TY 2013 Legal Fees Schedule

Name: THE GEORGE H SCANLON FOUNDATION

EIN: 42-6100764

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	30	15		15

TY 2013 Other Expenses Schedule**Name:** THE GEORGE H SCANLON FOUNDATION**EIN:** 42-6100764

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
POSTAGE	88	0		0
INVESTMENT EXPENSES	30	30		0
OFFICE SUPPLIES	122	0		0

TY 2013 Other Increases Schedule**Name:** THE GEORGE H SCANLON FOUNDATION**EIN:** 42-6100764

Description	Amount
NONDIVIDEND DISTRIBUTIONS	31,143

TY 2013 Other Professional Fees Schedule

Name: THE GEORGE H SCANLON FOUNDATION

EIN: 42-6100764

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT FEES	44,798	44,798		0

TY 2013 Taxes Schedule

Name: THE GEORGE H SCANLON FOUNDATION

EIN: 42-6100764

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAX	598	598		0