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Return of Private Foundation

OMB No. 1545-0052

2013Department of the Treasury
Internal Revenue Service

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

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

Open to Public Inspection

For calendar year 2013 or tax year beginning

, 2013, and ending

, 20

Name of foundation NYSTROM FAMILY FOUNDATION		A Employer identification number 46-1556508						
Number and street (or P.O. box number if mail is not delivered to street address)	Room/suite	B Telephone number (see instructions)						
KANALY TRUST, LTA 5555 SAN FELIPE SUITE 200								
City or town, state or province, country, and ZIP or foreign postal code HOUSTON, TX 77056								
G Check all that apply: <table border="0"> <tr> <td>☐ Initial return</td> <td>☐ Initial return of a former public charity</td> </tr> <tr> <td>☐ Final return</td> <td>☐ Amended return</td> </tr> <tr> <td>☐ Address change</td> <td>☐ Name change</td> </tr> </table>		☐ Initial return	☐ Initial return of a former public charity	☐ Final return	☐ Amended return	☐ Address change	☐ Name change	C If exemption application is pending, check here ☐ D 1 Foreign organizations, check here ☐ 2 Foreign organizations meeting the 85% test, check here and attach computation ☐ E If private foundation status was terminated under section 507(b)(1)(A), check here ☐ F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐
☐ Initial return	☐ Initial return of a former public charity							
☐ Final return	☐ Amended return							
☐ Address change	☐ Name change							
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation								
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 3,366,559.		J Accounting method: ☒ Cash ☐ Accrual ☐ 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 ☐ if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	68,181.	68,181.		STMT. 1
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	1,219,889.			
	b Gross sales price for all assets on line 6a	3,684,150.			
	7 Capital gain net income (from Part IV, line 2)		1,219,889.		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less: Cost of goods sold					
c Gross profit or (loss) (attach schedule)					
11 Other income (attach schedule)					
12 Total. Add lines 1 through 11	1,288,070.	1,288,070.			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.				
	14 Other employee salaries and wages		NONE	NONE	
	15 Pension plans, employee benefits		NONE	NONE	
	16a Legal fees (attach schedule) STMT. 4	12,971.	12,971.	NONE	NONE
	b Accounting fees (attach schedule) STMT. 5	1,000.	1,000.	NONE	NONE
	c Other professional fees (attach schedule) STMT. 6	25,080.	25,080.		
	17 Interest				
	18 Taxes (attach schedule) (see instructions) STMT. 7	449.	447.		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings		NONE	NONE	
	22 Printing and publications		NONE	NONE	
	23 Other expenses (attach schedule) STMT. 8	395.	395.		
	24 Total operating and administrative expenses. Add lines 13 through 23	39,895.	39,893.	NONE	NONE
	25 Contributions, gifts, grants paid	11,000.			11,000.
26 Total expenses and disbursements. Add lines 24 and 25	50,895.	39,893.	NONE	11,000.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	1,237,175.				
b Net investment income (if negative, enter -0-)		1,248,177.			
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	91.		
	2	Savings and temporary cash investments	20.	752,077.	752,077.
	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 ▶	NONE		
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10 a	Investments - U.S. and state government obligations (attach schedule)	826.		
	b	Investments - corporate stock (attach schedule)	1,829,449.	1,524,576.	1,762,934.
	c	Investments - corporate bonds (attach schedule)		690,080.	652,859.
	11	Investments - land, buildings, and equipment: basis Less: accumulated depreciation (attach schedule) ▶			
	12	Investments - mortgage loans			
	13	Investments - other (attach schedule)		206,520.	198,689.
	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)	1,830,386.	3,173,253.	3,366,559.	
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)		NONE		
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	1,830,386.	3,173,253.	
	28	Paid-in or capital surplus, or land, bldg., and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
30	Total net assets or fund balances (see instructions)	1,830,386.	3,173,253.		
31	Total liabilities and net assets/fund balances (see instructions)	1,830,386.	3,173,253.		

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	1,830,386.
2	Enter amount from Part I, line 27a	2	1,237,175.
3	Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 15	3	107,988.
4	Add lines 1, 2, and 3	4	3,175,549.
5	Decreases not included in line 2 (itemize) ▶ INCOME POSTED IN 2014 AND TAXED IN 2013	5	2,296.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	3,173,253.

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 PUBLICLY TRADED SECURITIES**

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 3,684,150.		2,464,261.	1,219,889.
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			1,219,889.
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	1,219,889.
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 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	NONE	2,959,595.	NONE
2011			
2010			
2009			
2008			

2 Total of line 1, column (d)	2	NONE
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	NONE
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	3,039,824.
5 Multiply line 4 by line 3	5	NONE
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	12,482.
7 Add lines 5 and 6	7	12,482.
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	11,000.

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

1a Exempt operating foundations described in section 4940(d)(2), check here ☐ 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	24,964.
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	24,964.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	NONE
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	24,964.
6 Credits/Payments:			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	24.	
b Exempt foreign organizations - tax withheld at source	6b	NONE	
c Tax paid with application for extension of time to file (Form 8868)	6c	NONE	
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	24.	
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	24,940.	
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 ☐ NONE Refunded ☐ ☐	11		

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ► \$ _____ (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? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ► _____ b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation.	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? If "Yes," complete Part XIV.		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses.		X

Form 990-PF (2013)

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions) STMT 16	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ N/A	13	X	
14	The books are in care of ▶ KANALY TRUST, LTA Telephone no. ▶ Located at ▶ 5555 SAN FELIPE - STE 200, HOUSTON, TX ZIP+4 ▶ 77056			
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? See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ▶	16	Yes	No X

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ 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 instructions)? ☐ Yes ☒ No	1b	
Organizations relying on a current notice regarding disaster assistance check here ▶ ☐		
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?	1c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? ☐ Yes ☒ No If "Yes," list the years ▶		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	2b	X
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ▶		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No		
b If "Yes," did it have excess business holdings in 2013 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013.)	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?	4b	X

Form 990-PF (2013)

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5a** During the year did the foundation pay or incur any amount to:

- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No
- (2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No
- (3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (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)? ☐ Yes ☒ NoOrganizations 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? ☐ Yes ☒ 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? ☐ Yes ☒ No**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors****1** List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
ROY E. NYSTROM 2208 BAYHOUSE DRIVE, ROCKPORT, TX 78382-3539	DIR. PRES.&TREAS	-0-	-0-	-0-
ELIZABETH NYSTROM 2208 BAYHOUSE DRIVE, ROCKPORT, TX 78382-3539	DIR. & SECRETARY	-0-	-0-	-0-
WINTHROP VOORHIES NYSTROM 2208 BAYHOUSE DRIVE, ROCKPORT, TX 78382-3539	DIR. & VICE PRES	-0-	-0-	-0-
SUZANNE NYSTROM 8292 S.W. LAFAYETTE WAY, WILSONVILLE, OR 97070-9433	DIR. & VICE PRES	-0-	-0-	-0-

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		NONE	NONE	NONE

Total number of other employees paid over \$50,000 ☐ **NONE**

Form 990-PF (2013)

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		NONE
Total number of others receiving over \$50,000 for professional services		NONE

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 NONE	
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 NONE	
2	
All other program-related investments. See instructions	
3 NONE	
Total. Add lines 1 through 3	

Form 990-PF (2013)

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	1,361,124.
b	Average of monthly cash balances	1b	604,034.
c	Fair market value of all other assets (see instructions)	1c	1,120,958.
d	Total (add lines 1a, b, and c)	1d	3,086,116.
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	NONE
3	Subtract line 2 from line 1d	3	3,086,116.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	46,292.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	3,039,824.
6	Minimum investment return. Enter 5% of line 5	6	151,991.

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	151,991.
2a	Tax on investment income for 2013 from Part VI, line 5	2a	24,964.
b	Income tax for 2013. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	24,964.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	127,027.
4	Recoveries of amounts treated as qualifying distributions	4	NONE
5	Add lines 3 and 4	5	127,027.
6	Deduction from distributable amount (see instructions)	6	NONE
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	7	127,027.

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	11,000.
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	NONE
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	NONE
b	Cash distribution test (attach the required schedule)	3b	NONE
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	11,000.
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	N/A
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	11,000.

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				127,027.
2 Undistributed income, if any, as of the end of 2013:				
a Enter amount for 2012 only			NONE	
b Total for prior years: 20 <u>11</u> , 20 <u>20</u>		NONE		
3 Excess distributions carryover, if any, to 2013:				
a From 2008	NONE			
b From 2009	NONE			
c From 2010	NONE			
d From 2011	NONE			
e From 2012	NONE			
f Total of lines 3a through e	NONE			
4 Qualifying distributions for 2013 from Part XII, line 4: ► \$ <u>11,000.</u>				
a Applied to 2012, but not more than line 2a			NONE	
b Applied to undistributed income of prior years (Election required - see instructions)		NONE		
c Treated as distributions out of corpus (Election required - see instructions)	NONE			
d Applied to 2013 distributable amount				11,000.
e Remaining amount distributed out of corpus	NONE			
5 Excess distributions carryover applied to 2013. (If an amount appears in column (d), the same amount must be shown in column (a).)	NONE			NONE
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	NONE			
b Prior years' undistributed income. Subtract line 4b from line 2b		NONE		
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		NONE		
d Subtract line 6c from line 6b. Taxable amount - see instructions		NONE		
e Undistributed income for 2012. Subtract line 4a from line 2a. Taxable amount - see instructions			NONE	
f Undistributed income for 2013. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2014				116,027.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)	NONE			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions)	NONE			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	NONE			
10 Analysis of line 9:				
a Excess from 2009	NONE			
b Excess from 2010	NONE			
c Excess from 2011	NONE			
d Excess from 2012	NONE			
e Excess from 2013	NONE			

NOT APPLICABLE

4942(j)(5)

(4) Gross investment income .

[illegible]

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
WOMEN'S CLUB OF ARANSAS COUNTY 1104 E. CONCHO STREET ROCKPORT TX 78382	NONE	501(C)(3)	GENERAL PURPOSE	11,000.
Total ▶ 3a				11,000.
b Approved for future payment				
Total ▶ 3b				

[illegible]

(See worksheet in line 13 instructions to verify calculations.)

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

Line No.	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instructions.)
▼	

NOT APPLICABLE

Schedule of Contributors

OMB No 1545-0047

2013

▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.

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

Name of the organization

Employer identification number

NYSTROM FAMILY FOUNDATION

46-1556508

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

☐ 501(c)() (enter number) organization

☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation

☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation

☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II.

Special Rules

☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3 % support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.

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

NYSTROM FAMILY FOUNDATION

Employer identification number

46-1556508

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	ROY NYSTROM MGMT TRUST C/O KANALY TRUST, LTA HOUSTON, TX 77056	\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

=====

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
-----	-----	-----
ASTON TAMRO SMALL CAP FUND-N	128.	128.
ASTON RIVER RD DIV ALL CAP-I	2,011.	2,011.
AIM CHARTERDELLR FUND CL Y	2,849.	2,849.
AT&T INC	284.	284.
ABBVIE INC	130.	130.
CAMBIAR SMALL CAP-INS	1,041.	1,041.
CAMBIAR OPPORTUNITY FD-INST	1,631.	1,631.
ADVISERS INVT TR JOHCM INTL SL I	238.	238.
ALTRIA GROUP INC	274.	274.
AMERICAN BEACON ST S/C GR-IS	175.	175.
AMERICAN ELECTRIC POWER	59.	59.
ASTRAZENECA PLC-SPONS ADR	126.	126.
BCE INC	115.	115.
BP AMOCO PLC SPONS ADR	233.	233.
BRISTOL MYERS SQUIBB CO	99.	99.
CHEVRONTXACO CORP	42.	42.
COCA COLA CO	48.	48.
CONOCOPHILLIPS COM	227.	227.
DOMINION RESOURCES INC/VA	137.	137.
DOUBLELINE TOTL RET BND-I	16,187.	16,187.
DRIEHAUS ACTIVE INCOME FUND	924.	924.
DUKE ENERGY CORP COM NPV	209.	209.
PARAMETRIC EMERGING MRKTS-I	573.	573.
FEDERATED STRAT VAL DVD-A	4,973.	4,973.
GLAXOSMITHKLINE PLC-SPON ADR	120.	120.
HCP INC	72.	72.
HARDING LOEVNER EMG MKTS	739.	739.
HARDING LOEVNER INTL EQTY-IV	335.	335.
OAKMARK INTL SMALL CAP-CL I	1,116.	1,116.
HEALTH CARE REIT INC	124.	124.
ISHARES SELECT DIVIDEND ETF	1,858.	1,858.
ISHARES CORE S&P 500 ETF	899.	899.

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

=====

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
-----	-----	-----
ISHARES RUSSELL 1000 VALUE E	1,335.	1,335.
ISHARES RUSSELL 1000 GROWTH	1,773.	1,773.
JOHNSON & JOHNSON	161.	161.
KIMBERLY CLARK CORP	104.	104.
KRAFT FOODS GROUP INC	190.	190.
LILLY (ELI) & CO	47.	47.
LORILLARD INC	164.	164.
MCDONALDS CORP	134.	134.
MERCK & CO. INC.	204.	204.
NATIONAL GRID PLC-SP ADR	243.	243.
NATIXIS VAUGHAN NEL S/C VL-Y	2,766.	2,766.
PPL CORPORATION	154.	154.
PEPSICO INC	38.	38.
PHILIP MORRIS INTERNATIONAL	95.	95.
PIMCO ALL ASSET FUND-INSTITU	4,674.	4,674.
PIMCO COMMODITY RR STRAT-INS	1,205.	1,205.
PIMCO INVESTMENT GRD CORP-IN	9,291.	9,291.
PROCTER & GAMBLE CO	47.	47.
OSTERWEIS STRATEGIC INC FD I	5,165.	5,165.
REALTY INCOME CORP	45.	45.
REYNOLDS AMERICAN INC	246.	246.
ROYAL DUTCH SHELL PLC-ADR	257.	257.
SEI MULTI-ASSET ACCUM-A	614.	614.
SEI DAILY INCOME TR GOVT-SWP	10.	10.
SCHWAB GOVT MONEY FUND	42.	42.
SENIOR HOUSING PROP TRUST	89.	89.
SOUTHERN CO	209.	209.
TOTAL SA-SPON ADR	300.	300.
UNILEVER PLC-SPONSORED ADR	47.	47.
VENTAS INC	19.	19.
VERIZON COMMUNICATIONS INC	234.	234.
VODAFONE GROUP PLC-SP ADR	249.	249.
WILLIAMS COS INC	27.	27.

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FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

=====

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
-----	-----	-----
WINDSTREAM CORPORATION	27.	27.
TOTAL	68,181.	68,181.
	=====	=====

FORM 990PF, PART I - LEGAL FEES
=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----	ADJUSTED NET INCOME -----	CHARITABLE PURPOSES -----
LEGAL FEES - PRINCIPAL (ALLOCA	12,971.	12,971.		
TOTALS	12,971.	12,971.	NONE	NONE
	=====	=====	=====	=====

FORM 990PF, PART I - ACCOUNTING FEES
=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----	ADJUSTED NET INCOME -----	CHARITABLE PURPOSES -----
TAX PREPARATION FEE (ALLOCABLE	1,000.	1,000.		
TOTALS	1,000.	1,000.	NONE	NONE
	=====	=====	=====	=====

FORM 990PF, PART I - OTHER PROFESSIONAL FEES

=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----
TRUSTEE/EXECUTOR FEES-PRINCIPA	25,080.	25,080.
	-----	-----
TOTALS	25,080.	25,080.
	=====	=====

FORM 990PF, PART I - TAXES

=====

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
-----	-----	-----
FOREIGN TAXES	107.	107.
FEDERAL TAX PAYMENT - PRIOR YE	2.	
FEDERAL ESTIMATES - PRINCIPAL	24.	24.
FOREIGN TAXES ON QUALIFIED FOR	296.	296.
FOREIGN TAXES ON NONQUALIFIED	20.	20.
	-----	-----
TOTALS	449.	447.
	=====	=====

FORM 990PF, PART I - OTHER EXPENSES

=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----
OTHER NON-ALLOCABLE EXPENSE -	27.	27.
OTHER NON-ALLOCABLE EXPENSE -	5.	5.
OTHER ALLOCABLE EXPENSES - 2%	363.	363.
TOTALS	----- 395. =====	----- 395. =====

NYSTROM FAMILY FOUNDATION

46-1556508

FORM 990PF, PART II - U.S. AND STATE OBLIGATIONS
=====

DESCRIPTION

MUNI INCOME FUND

TOTALS

NYSTROM FAMILY FOUNDATION

46-1556508

FORM 990PF, PART II - CORPORATE STOCK
=====

DESCRIPTION -----	ENDING BOOK VALUE -----	ENDING FMV ---
FIDELITY BLUE CHIP GWTH		
FIDELITY CONTRA FUND		
FIDELITY DIVERSIFIED		
FIDELITY EQUITY INCOME		
FIDELITY GROWTH COMPANY		
FIDELITY LOW PRICED		
FIDELITY MEGA CAP STOCK		
FIDELITY SPARTAN 500		
FIDELITY SPARTAN INTL		
FIDELITY STRAT REAL		
FIDELITY STRATEGIC DIV		
ABBVIE INC		
ALTRIA GROUP INC		
AMERICAN BEACON STEPHENS SMALL		
AMERICAN ELECTRIC POWER		
ASTON RIVER ROAD DIV ALL CAP		
ASTON TAMRO SMALL CAP		
AT&T INC		
BRISTOL MYERS SQUIBB CO		
CAMBIAR OPPORTUNITY FUND		
CAMBIAR SMALL CAP FUND		
CHEVRON CORP		
COCA COLA CO		
CONOCO PHILLIPS		
DOMINION RESOURCES INC		
DUKE ENERGY CORP COM		
EDGEWOOD GROWTH FUND		
ELI LILLY & CO		
FEDERATED STRATEGIC VAL DIV		
	4,186.	5,703.
	7,365.	8,024.
	45,153.	57,898.
	1,843.	1,870.
	65,020.	74,035.
	60,000.	65,415.
	7,974.	7,876.
	1,403.	2,020.
	110,020.	133,953.
	35,020.	39,651.
	1,629.	1,749.
	1,636.	1,776.
	6,746.	8,125.
	3,442.	3,946.
	6,241.	6,211.
	75,000.	97,236.
	1,751.	1,632.
	170,000.	189,540.

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STATEMENT 10

FORM 990PF, PART II - CORPORATE STOCK
=====

DESCRIPTION -----	ENDING BOOK VALUE -----	ENDING FMV ---
GENEVA ADVISORS ALL CAP GRWTH	65,000.	84,363.
HCP INC	2,381.	1,780.
HEALTH CARE REIT INC	3,676.	3,053.
INVESCO CHARTER FUND	120,020.	137,871.
ISHARES CORE S&P 500	86,582.	93,011.
ISHARES RUSSELL 1000 GROWTH	109,318.	137,520.
ISHARES RUSSELL 1000 VALUE	74,065.	86,825.
ISHARES SELECT DIVIDEND	51,475.	60,648.
JOHNSON & JOHNSON	4,777.	5,679.
KIMBERLEY-CLARK CORP	3,977.	4,492.
KRAFT FOODS GROUP INC	6,660.	7,332.
LORILLARD INC	3,704.	4,358.
MCDONALD'S CORP	4,063.	4,172.
MERCK & CO	6,712.	7,908.
NATAXIS VAUGHAN NELSON SM CAP	56,379.	62,270.
PEPSICO INC	1,750.	1,908.
PHILIP MORRIS INT'L INC	3,631.	3,398.
PPL CORP	4,308.	4,213.
PROCTER & GAMBLE INC.	2,015.	2,117.
REALTY INCOME CORP COM	2,170.	1,867.
REYNOLDS AMERICAN INC	5,967.	6,649.
SENIOR HOUSING PROPERTIES TR	2,517.	2,179.
SOUTHERN CO	6,135.	5,632.
VENTAS INC	1,728.	1,547.
VERIZON COMMUNICATIONS INC	6,765.	7,371.
WILLIAMS COS	2,641.	2,777.
ADVISERS INVT TR JOHCM INTL	43,020.	55,277.
ASTRAZENECA ADR	5,317.	6,946.
BCE INC	1,998.	1,948.

FORM 990PF, PART II - CORPORATE STOCK
=====

DESCRIPTION -----	ENDING BOOK VALUE -----	ENDING FMV ----
BP ADR		
GLAXOSMITHKLINE PLC	5,816.	6,854.
HARDING LOEVNER EMRG MKTS	4,964.	5,820.
HARDING LOEVNER INTL EQUITY	75,000.	75,934.
NATIONAL GRID NEW ADR	58,000.	65,414.
OAKMARK INTL SMALL CAP	5,723.	6,859.
PARAMETRIC EMERG MKTS FD	30,077.	33,947.
ROYAL DUTCH SHELL ADR	32,020.	31,660.
TOTAL ADR	6,456.	7,135.
UNILEVER PLC	6,570.	7,904.
VODAFONE GROUP	1,794.	1,813.
	4,976.	7,823.
	-----	-----
TOTALS	1,524,576.	1,762,934.
	=====	=====

NYSTROM FAMILY FOUNDATION

46-1556508

FORM 990PF, PART II - CORPORATE BONDS
=====

DESCRIPTION -----	ENDING BOOK VALUE -----	ENDING FMV -----
DOUBLELINE TOTAL RETURN BD FD	336,040.	318,368.
OSTERWEIS STRATEGIC INC FD	109,000.	108,431.
PIMCO INVEST GRADE CORP BD FD	245,040.	226,060.
	-----	-----
TOTALS	690,080.	652,859.
	=====	=====

NYSTROM FAMILY FOUNDATION

46-1556508

FORM 990PF, PART II - OTHER INVESTMENTS
=====

DESCRIPTION -----	COST/ FMV C OR F -----	ENDING BOOK VALUE -----	ENDING FMV -----
DRIEHAUS ACTIVE INCOME FD	C	46,000.	46,000.
PIMCO ALL ASSET FD	C	100,520.	95,368.
SEI MULTI-ASSET ACCUM FD	C	60,000.	57,321.
		-----	-----
TOTALS		206,520.	198,689.
		=====	=====

FORM 990PF, PART III - OTHER INCREASES IN NET WORTH OR FUND BALANCES

DESCRIPTION

AMOUNT

FEES POSTED IN 2014 AND TAXED IN 2013	2,003.
BASIS ADJUSTMENT FOR FIDELITY SPARTAN 500 INDEX FUND	2,432.
BASIS ADJUSTMENT FOR FIDELITY INTERMEDIATE MUNICP FD	103,553.

TOTAL	107,988.
	=====

FORM 990PF, PART VII-A, LINE 12 EXPLANATION

=====

NO

NYSTROM FAMILY FOUNDATION
FORM 990PF, PART XV - LINES 2a - 2d
=====

46-1556508

RECIPIENT NAME:

ROY E. NYSTROM, DIRECTOR

ADDRESS:

2208 BAYHOUSE DRIVE

ROCKPORT, TX 78382

RESTRICTIONS OR LIMITATIONS ON AWARDS:

NONE

STATEMENT 17

**SCHEDULE D
(Form 1041)**

Department of the Treasury
Internal Revenue Service

Capital Gains and Losses

► Attach to Form 1041, Form 5227, or Form 990-T.
► Use Form 8949 to list your transactions for lines 1b, 2, 3, 8b, 9 and 10.
► Information about Schedule D and its separate instructions is at www.irs.gov/form1041

OMB No. 1545-0092

2013

Name of estate or trust

NYSTROM FAMILY FOUNDATION

Employer identification number

46-1556508

Note: Form 5227 filers need to complete *only* Parts I and II.

Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less

See instructions for how to figure the amounts to enter on the lines below.

This form may be easier to complete if you round off cents to whole dollars.

	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part I, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
1a Totals for all short-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 1b				
1b Totals for all transactions reported on Form(s) 8949 with Box A checked				
2 Totals for all transactions reported on Form(s) 8949 with Box B checked				
3 Totals for all transactions reported on Form(s) 8949 with Box C checked	610,754.	640,053.		-29,299.
4 Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824			4	
5 Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts			5	
6 Short-term capital loss carryover. Enter the amount, if any, from line 9 of the 2012 Capital Loss Carryover Worksheet			6 ()	
7 Net short-term capital gain or (loss). Combine lines 1a through 6 in column (h). Enter here and on line 17, column (3) on the back ►			7	-29,299.

Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year

See instructions for how to figure the amounts to enter on the lines below.

This form may be easier to complete if you round off cents to whole dollars.

	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part II, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
8a Totals for all long-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 8b				
8b Totals for all transactions reported on Form(s) 8949 with Box D checked				
9 Totals for all transactions reported on Form(s) 8949 with Box E checked				
10 Totals for all transactions reported on Form(s) 8949 with Box F checked	3,033,604.	1,824,208.		1,209,396.
11 Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824			11	
12 Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts			12	
13 Capital gain distributions			13	39,792.
14 Gain from Form 4797, Part I			14	
15 Long-term capital loss carryover. Enter the amount, if any, from line 14 of the 2012 Capital Loss Carryover Worksheet			15 ()	
16 Net long-term capital gain or (loss). Combine lines 8a through 15 in column (h). Enter here and on line 18a, column (3) on the back ►			16	1,249,188.

For Paperwork Reduction Act Notice, see the Instructions for Form 1041.

Schedule D (Form 1041) 2013

Part III Summary of Parts I and II**Caution:** Read the instructions *before* completing this part.

	(1) Beneficiaries' (see instr.)	(2) Estate's or trust's	(3) Total
17 Net short-term gain or (loss)	17		-29,299.
18 Net long-term gain or (loss):			
a Total for year	18a		1,249,188.
b Unrecaptured section 1250 gain (see line 18 of the wrksht.)	18b		
c 28% rate gain	18c		
19 Total net gain or (loss). Combine lines 17 and 18a. ▶	19		1,219,889.

Note: If line 19, column (3), is a net gain, enter the gain on Form 1041, line 4 (or Form 990-T, Part I, line 4a). If lines 18a and 19, column (2), are net gains, go to Part V, and do not complete Part IV. If line 19, column (3), is a net loss, complete Part IV and the **Capital Loss Carryover Worksheet**, as necessary.

Part IV Capital Loss Limitation

20 Enter here and enter as a (loss) on Form 1041, line 4 (or Form 990-T, Part I, line 4c, if a trust), the smaller of:	20	()
a The loss on line 19, column (3) or b \$3,000		

Note: If the loss on line 19, column (3), is more than \$3,000, or if Form 1041, page 1, line 22 (or Form 990-T, line 34), is a loss, complete the **Capital Loss Carryover Worksheet** in the instructions to figure your capital loss carryover.

Part V Tax Computation Using Maximum Capital Gains Rates

Form 1041 filers. Complete this part **only** if both lines 18a and 19 in column (2) are gains, or an amount is entered in Part I or Part II and there is an entry on Form 1041, line 2b(2), and Form 1041, line 22, is more than zero.

Caution: Skip this part and complete the **Schedule D Tax Worksheet** in the instructions if:

- Either line 18b, col. (2) or line 18c, col. (2) is more than zero, or
- Both Form 1041, line 2b(1), and Form 4952, line 4g are more than zero.

Form 990-T trusts. Complete this part **only** if both lines 18a and 19 are gains, or qualified dividends are included in income in Part I of Form 990-T, and Form 990-T, line 34, is more than zero. Skip this part and complete the **Schedule D Tax Worksheet** in the instructions if either line 18b, col. (2) or line 18c, col. (2) is more than zero.

21 Enter taxable income from Form 1041, line 22 (or Form 990-T, line 34). . .	21	
22 Enter the smaller of line 18a or 19 in column (2) but not less than zero.	22	
23 Enter the estate's or trust's qualified dividends from Form 1041, line 2b(2) (or enter the qualified dividends included in income in Part I of Form 990-T). . .	23	
24 Add lines 22 and 23	24	
25 If the estate or trust is filing Form 4952, enter the amount from line 4g; otherwise, enter -0-. . . ▶	25	
26 Subtract line 25 from line 24. If zero or less, enter -0-	26	
27 Subtract line 26 from line 21. If zero or less, enter -0-	27	
28 Enter the smaller of the amount on line 21 or \$2,450	28	
29 Enter the smaller of the amount on line 27 or line 28	29	
30 Subtract line 29 from line 28. If zero or less, enter -0-. This amount is taxed at 0% ▶	30	
31 Enter the smaller of line 21 or line 26	31	
32 Subtract line 30 from line 26	32	
33 Enter the smaller of line 21 or \$11,950	33	
34 Add lines 27 and 30	34	
35 Subtract line 34 from line 33. If zero or less, enter -0-	35	
36 Enter the smaller of line 32 or line 35	36	
37 Multiply line 36 by 15%. ▶	37	
38 Enter the amount from line 31	38	
39 Add lines 30 and 36	39	
40 Subtract line 39 from line 38. If zero or less, enter -0-	40	
41 Multiply line 40 by 20% ▶	41	
42 Figure the tax on the amount on line 27. Use the 2013 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)	42	
43 Add lines 37, 41, and 42	43	
44 Figure the tax on the amount on line 21. Use the 2013 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)	44	
45 Tax on all taxable income. Enter the smaller of line 43 or line 44 here and on Form 1041, Schedule G, line 1a (or Form 990-T, line 36) ▶	45	

Schedule D (Form 1041) 2013

Sales and Other Dispositions of Capital Assets

OMB No 1545-0074

► Information about Form 8949 and its separate instructions is at www.irs.gov/form8949.**2013**Department of the Treasury
Internal Revenue Service

► File with your Schedule D to list your transactions for lines 1b, 2, 3, 8b, 9, and 10 of Schedule D.

Attachment
Sequence No **12A**

Name(s) shown on return

Social security number or taxpayer identification number

NYSTROM FAMILY FOUNDATION

46-1556508

Most brokers issue their own substitute statement instead of using Form 1099-B. They also may provide basis information (usually your cost) to you on the statement even if it is not reported to the IRS. Before you check Box A, B, or C below, determine whether you received any statement(s) and, if so, the transactions for which basis was reported to the IRS. Brokers are required to report basis to the IRS for most stock you bought in 2011 or later.

Part I Short-Term. Transactions involving capital assets you held one year or less are short-term. For long-term transactions, see page 2.

Note. You may aggregate all short-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which no adjustments or codes are required. Enter the total directly on Schedule D, line 1a; you are not required to report these transactions on Form 8949 (see instructions).

You must check Box A, B, or C below. Check only one box. If more than one box applies for your short-term transactions, complete a separate Form 8949, page 1, for each applicable box. If you have more short-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need.

- ☐ (A) Short-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see **Note** above)
- ☐ (B) Short-term transactions reported on Form(s) 1099-B showing basis was **not** reported to the IRS
- ☒ (C) Short-term transactions not reported to you on Form 1099-B

(a) Description of property (Example. 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis. See the Note below and see <i>Column (e)</i> in the separate instructions	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
					(f) Code(s) from instructions	(g) Amount of adjustment	
215.852 FIDELITY DIVERSIFI INTERNATIONAL FD	12/07/2012	01/29/2013	6,708.00	6,340.00			368.00
47.401 FIDELITY SPARTAN 50 ADVANTAGE CL	11/16/2012	01/29/2013	2,533.00	2,432.00			101.00
8.967 FIDELITY SPARTAN INT FIDELITY ADVANTAGE	12/14/2012	01/29/2013	321.00	302.00			19.00
94.283 FIDELITY STRAT REAL	12/14/2012	01/29/2013	920.00	917.00			3.00
19.006 FIDELITY CONTRA FUN	12/14/2012	01/29/2013	1,539.00	1,458.00			81.00
22.063 FIDELITY EQUITY INC	10/05/2012	01/29/2013	1,103.00	1,056.00			47.00
80.119 FIDELITY STRATEGIC FD	10/05/2012	01/29/2013	1,033.00	996.00			37.00
90.062 FIDELITY GROWTH COM	01/11/2013	01/29/2013	8,780.00	8,366.00			414.00
65.294 FIDELITY LOW PRICED	12/14/2012	01/29/2013	2,720.00	2,539.00			181.00
10088.626 FIDELITY INTERME	12/21/2012	01/29/2013	107,525.00	104,169.00			3,356.00
913. MARKET VECTORS ETF TR MINERS FUND	01/29/2013	02/21/2013	34,896.00	38,533.00			-3,637.00
55.758 FIDELITY BLUE CHIP	12/14/2012	03/07/2013	2,954.00	2,704.00			250.00
602. MARKET VECTORS ETF TR MINERS FUND	01/29/2013	04/03/2013	20,514.00	25,407.00			-4,893.00
35. GLAXOSMITHKLINE PLC-SP	02/20/2013	04/18/2013	1,755.00	1,594.00			161.00

2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, line 1b (if **Box A** above is checked), line 2 (if **Box B** above is checked), or line 3 (if **Box C** above is checked) ►

Note. If you checked Box A above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and enter an adjustment in column (g) to correct the basis. See *Column (g)* in the separate instructions for how to figure the amount of the adjustment.

For Paperwork Reduction Act Notice, see your tax return instructions.

Form **8949** (2013)

Name(s) shown on return. (Name and SSN or taxpayer identification no. not required if shown on other side)

Social security number or taxpayer identification number

NYSTROM FAMILY FOUNDATION

46-1556508

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Part II Long-Term. Transactions involving capital assets you held more than one year are long term. For short-term transactions, see page 1.

Note. You may aggregate all long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which no adjustments or codes are required. Enter the total directly on Schedule D, line 8a; you are not required to report these transactions on Form 8949 (see instructions).

You must check Box D, E, or F below. Check only one box. If more than one box applies for your long-term transactions, complete a separate Form 8949, page 2, for each applicable box. If you have more long-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need.

☐ **(D)** Long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see **Note** above)

☐ **(E)** Long-term transactions reported on Form(s) 1099-B showing basis was **not** reported to the IRS

☒ **(F)** Long-term transactions not reported to you on Form 1099-B

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis. See the Note below and see Column (e) in the separate instructions	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s) from instructions	(g) Amount of adjustment	
	12098.43 FIDELITY DIVERSIF INTERNATIONAL FD	11/16/2011	01/29/2013	376,000.00	215,952.00			160,048.00
	8874.314 FIDELITY SPARTAN ADVANTAGE CL	11/16/2011	01/29/2013	474,135.00	200,492.00			273,643.00
	7541.374 FIDELITY SPARTAN FIDELITY ADVANTAGE	11/16/2011	01/29/2013	269,961.00	241,760.00			28,201.00
	13872.396 FIDELITY STRAT R FD	11/16/2011	01/29/2013	135,375.00	113,602.00			21,773.00
	2329.258 FIDELITY CONTRA F	11/16/2011	01/29/2013	188,580.00	129,991.00			58,589.00
	3404.857 FIDELITY EQUITY I	11/16/2011	01/29/2013	170,223.00	105,061.00			65,162.00
	14026.453 FIDELITY STRATEG INCM FD	11/16/2011	01/29/2013	180,921.00	161,280.00			19,641.00
	41089.231 FIDELITY MEGA CA	11/16/2011	01/29/2013	516,061.00	284,910.00			231,151.00
	3425.917 FIDELITY GROWTH C	11/16/2011	01/29/2013	333,973.00	128,735.00			205,238.00
	3811.755 FIDELITY LOW PRIC FUND	11/16/2011	01/29/2013	158,778.00	116,357.00			42,421.00
	3976.882 FIDELITY BLUE CHI	11/16/2011	03/07/2013	210,715.00	107,186.00			103,529.00
	23. ASTRAZENECA PLC-SPONS		12/03/2013	1,315.00	1,315.00			
	23. ASTRAZENECA PLC-SPONS		12/03/2013	-1,315.00	-1,315.00			
	35. VODAFONE GROUP PLC-SP		12/03/2013	1,293.00	1,293.00			
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, line 8b (if Box D above is checked), line 9 (if Box E above is checked), or line 10 (if Box F above is checked) ▶								

Note. If you checked Box D above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and enter an adjustment in column (g) to correct the basis. See **Column (g)** in the separate instructions for how to figure the amount of the adjustment.

Name(s) shown on return. (Name and SSN or taxpayer identification no. not required if shown on other side)

Social security number or taxpayer identification number

NYSTROM FAMILY FOUNDATION

46-1556508

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Part II Long-Term. Transactions involving capital assets you held more than one year are long term. For short-term transactions, see page 1.

Note. You may aggregate all long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which no adjustments or codes are required. Enter the total directly on Schedule D, line 8a; you are not required to report these transactions on Form 8949 (see instructions).

You must check Box D, E, or F below. Check only one box. If more than one box applies for your long-term transactions, complete a separate Form 8949, page 2, for each applicable box. If you have more long-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need.

☐ **(D)** Long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see **Note** above)

☐ **(E)** Long-term transactions reported on Form(s) 1099-B showing basis was **not** reported to the IRS

☒ **(F)** Long-term transactions not reported to you on Form 1099-B

1	(a) Description of property (Example. 100 sh XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis. See the Note below and see Column (e) in the separate instructions	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s) from instructions	(g) Amount of adjustment	
	35. VODAFONE GROUP PLC-SP		12/03/2013	-1,293.00	-1,293.00			
	1001.39 SEI DAILY INCOME T		12/06/2013	1,001.00	1,001.00			
	2641.43 SEI DAILY INCOME T		12/09/2013	2,641.00	2,641.00			
	973.58 SEI DAILY INCOME TR		12/09/2013	974.00	974.00			
	69.53 SEI DAILY INCOME TR		12/11/2013	70.00	70.00			
	1220.54 SEI DAILY INCOME T		12/12/2013	1,221.00	1,221.00			
	5205.99 SEI DAILY INCOME T		12/13/2013	5,206.00	5,206.00			
	16.18 SEI DAILY INCOME TR		12/13/2013	16.00	16.00			
	55.96 SEI DAILY INCOME TR		12/17/2013	56.00	56.00			
	7400.11 SEI DAILY INCOME T		12/17/2013	7,400.00	7,400.00			
	70.2 SEI DAILY INCOME TR G		12/18/2013	70.00	70.00			
	34.31 SEI DAILY INCOME TR		12/23/2013	34.00	34.00			
	80.37 SEI DAILY INCOME TR		12/24/2013	80.00	80.00			
	85.5 SEI DAILY INCOME TR G		12/26/2013	86.00	86.00			
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, line 8b (if Box D above is checked), line 9 (if Box E above is checked), or line 10 (if Box F above is checked) ▶								

Note. If you checked Box D above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and enter an adjustment in column (g) to correct the basis. See **Column (g)** in the separate instructions for how to figure the amount of the adjustment.

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☐ (D) Long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see **Note** above)

☐ (E) Long-term transactions reported on Form(s) 1099-B showing basis was **not** reported to the IRS

☒ (F) Long-term transactions not reported to you on Form 1099-B

1	(a) Description of property (Example. 100 sh XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis. See the Note below and see <i>Column (e)</i> in the separate instructions	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s) from instructions	(g) Amount of adjustment	
	27.36 SEI DAILY INCOME TR		12/31/2013	27.00	27.00			
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, line 8b (if Box D above is checked), line 9 (if Box E above is checked), or line 10 (if Box F above is checked) ▶				3,033,604.	1,824,208.			1,209,396.

Note. If you checked Box D above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and enter an adjustment in column (g) to correct the basis. See *Column (g)* in the separate instructions for how to figure the amount of the adjustment.