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## 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 separate instructions is at [www.irs.gov/form990pf](http://www.irs.gov/form990pf).

OMB No. 1545-0052

2013

Open to Public Inspection

For calendar year 2013 or tax year beginning

, and ending

Name of foundation <b>DWIGHT S. HALDAN FAMILY CHARITABLE FOUNDATION 58271-0 &amp;-1</b>		A Employer identification number <b>71-0865524</b>
Number and street (or P.O. box number if mail is not delivered to street address) <b>C/O WILM TR 1100 MARKET ST DE3-C070</b>	Room/suite	B Telephone number <b>302 651 1055</b>
City or town, state or province, country, and ZIP or foreign postal code <b>WILMINGTON, DE 19890-0900</b>		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) <b>\$ 1,602,859.</b>	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check <input checked="" type="checkbox"/> If the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities		31,329.	31,329.		STATEMENT 1
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		152,295.			
b Gross sales price for all assets on line 6a <b>250,255.</b>					
7 Capital gain net income (from Part IV, line 2)			152,295.		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less: Cost of goods sold					
c Gross profit or (loss)					
11 Other income		9,830.	0.		STATEMENT 2
12 Total. Add lines 1 through 11		193,454.	183,624.		
13 Compensation of officers, directors, trustees, etc		0.	0.		0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees					
c Other professional fees <b>STMT 3</b>		8,025.	7,460.		565.
17 Interest					
18 Taxes <b>STMT 4</b>		638.	638.		0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses <b>STMT 5</b>		2,841.	0.		0.
24 Total operating and administrative expenses. Add lines 13 through 23		11,504.	8,098.		565.
25 Contributions, gifts, grants paid		351,960.			351,960.
26 Total expenses and disbursements. Add lines 24 and 25		363,464.	8,098.		352,525.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		<170,010.>			
b Net investment income (if negative, enter -0-)			175,526.		
c Adjusted net income (if negative, enter -0-)				N/A	

# DWIGHT S. HALDAN FAMILY CHARITABLE

FOUNDATION 58271-0 &-1

71-0865524

Page 2

Form 990-PF (2013)

## Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only.

			Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
1	Cash - non-interest-bearing		4,339.	26,190.	26,190.
2	Savings and temporary cash investments		22,975.	47,423.	47,423.
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				
7	Other notes and loans receivable ▶				
	Less: allowance for doubtful accounts ▶				
8	Inventories for sale or use				
9	Prepaid expenses and deferred charges				
10a	Investments - U.S. and state government obligations				
b	Investments - corporate stock	STMT 6	202,123.	125,200.	123,618.
c	Investments - corporate bonds	STMT 7	77,712.	58,868.	64,134.
11	Investments - land, buildings, and equipment: basis ▶				
	Less: accumulated depreciation ▶				
12	Investments - mortgage loans				
13	Investments - other	STMT 8	1,174,882.	1,054,340.	1,341,494.
14	Land, buildings, and equipment: basis ▶				
	Less: accumulated depreciation ▶				
15	Other assets (describe ▶)				
16	Total assets (to be completed by all filers - see the instructions. Also, see page 1, item 1)		1,482,031.	1,312,021.	1,602,859.
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				
22	Other liabilities (describe ▶)				
23	Total liabilities (add lines 17 through 22)		0.	0.	
	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>				
	and complete lines 24 through 26 and lines 30 and 31.				
24	Unrestricted				
25	Temporarily restricted				
26	Permanently restricted				
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>				
	and complete lines 27 through 31.				
27	Capital stock, trust principal, or current funds		1,482,031.	1,312,021.	
28	Paid-in or capital surplus, or land, bldg., and equipment fund		0.	0.	
29	Retained earnings, accumulated income, endowment, or other funds		0.	0.	
30	Total net assets or fund balances		1,482,031.	1,312,021.	
31	Total liabilities and net assets/fund balances		1,482,031.	1,312,021.	

## Part III Analysis of Changes in Net Assets or Fund Balances

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	1,482,031.
Enter amount from Part I, line 27a	2	<170,010.>
Other increases not included in line 2 (itemize) ▶	3	0.
Add lines 1, 2, and 3	4	1,312,021.
Decreases not included in line 2 (itemize) ▶	5	0.
Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,312,021.

Form 990-PF (2013)

**DWIGHT S. HALDAN FAMILY CHARITABLE**

Form 990-PF (2013)

**FOUNDATION 58271-0 &-1**

**71-0865524**

Page **3**

**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**

**P**

**VARIOUS**

**12/31/13**

**b WILMINGTON GLOBAL EQUITY GAINS ON K-1**

**P**

**VARIOUS**

**12/31/13**

**c CAPITAL GAINS DIVIDENDS**

**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)
<b>a 100,000.</b>		<b>97,960.</b>	<b>2,040.</b>
<b>b 149,222.</b>			<b>149,222.</b>
<b>c 1,033.</b>			<b>1,033.</b>
<b>d</b>			
<b>e</b>			

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	
<b>a</b>			<b>2,040.</b>
<b>b</b>			<b>149,222.</b>
<b>c</b>			<b>1,033.</b>
<b>d</b>			
<b>e</b>			

**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**

**152,295.**

**3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):**

If gain, also enter in Part I, line 8, column (c).

If (loss), enter -0- in Part I, line 8

**3**

**N/A**

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

**1 Enter the appropriate amount in each column for each year; see the instructions before making any entries.**

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2012	317,090.	1,680,130.	.188729
2011	410,564.	1,862,026.	.220493
2010	161,776.	1,949,063.	.083002
2009	143,027.	1,771,304.	.080747
2008	148,562.	2,426,709.	.061220

**2 Total of line 1, column (d)**

**2**

**.634191**

**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**

**.126838**

**4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5**

**4**

**1,476,906.**

**5 Multiply line 4 by line 3**

**5**

**187,328.**

**6 Enter 1% of net investment income (1% of Part I, line 27b)**

**6**

**1,755.**

**7 Add lines 5 and 6**

**7**

**189,083.**

**8 Enter qualifying distributions from Part XII, line 4**

**8**

**352,525.**

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.

**DWIGHT S. HALDAN FAMILY CHARITABLE**

**FOUNDATION 58271-0 &-1**

**71-0865524**

Page 4

Form 990-PF (2013)

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1	1,755.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	1,755.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	1,755.
6 Credits/Payments:			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	1,430.	
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	1,430.	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	325.	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11 Enter the amount of line 10 to be: Credited to 2014 estimated tax <input checked="" type="checkbox"/> Refunded <input type="checkbox"/>	11		

**Part VII-A Statements Regarding Activities**

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
1c Did the foundation file Form 1120-POL for this year?		X
2 Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. \$ 0. (2) On foundation managers. \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?		X
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <u>AZ</u>		
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)

**DWIGHT S. HALDAN FAMILY CHARITABLE**

**FOUNDATION 58271-0 &-1**

**71-0865524**

Page 5

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		<b>X</b>
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		<b>X</b>
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <b>NO WEB SITE</b>	13	<b>X</b>	
14	The books are in care of ► <b>WILMINGTON TRUST</b> Located at ► <b>1100 MARKET ST DE3-C070, WILMINGTON, DE</b>	Telephone no. ► <b>302 651 1055</b> ZIP+4 ► <b>19890-0001</b>		
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	<b>N/A</b>	
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	<b>Yes</b>	<b>No</b> <b>X</b>

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

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

		Yes	No
1a	During the year did the foundation (either directly or indirectly):		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here	<b>N/A</b>	<b>1b</b>
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?		<b>1c</b> <b>X</b>
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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.) <b>N/A</b>	<b>2b</b>	
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ►		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If "Yes," did it have excess business holdings in 2013 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013.) <b>N/A</b>	<b>3b</b>	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	<b>4a</b>	<b>X</b>
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?	<b>4b</b>	<b>X</b>

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)? ☐ 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 ☒ No **5b**

Organizations relying on a current notice regarding disaster assistance check here ☐ Yes ☒ No

**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 **6b**

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 **7b**

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**

List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
DWIGHT S. HALDAN 0040 EAST HAPPY VALLEY ROAD SCOTTSDALE, AZ 85255	TRUSTEE 1.00	0.	0.	0.

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Total number of other employees paid over \$50,000 **0**

## Part VIII.

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

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

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

**Total** number of others receiving over \$50,000 for professional services

<b>Part IX-A</b>	<b>Summary of Direct Charitable Activities</b>
------------------	--

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

## Expenses

1	N/A	
2		
3		
4		

<b>Part IX-B</b>	<b>Summary of Program-Related Investments</b>
------------------	---

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

**Amount**

1	N/A	
2		
All other program-related investments. See instructions.		
3		
Total. Add lines 1 through 3		0

Form **990-PF** (2013)



**DWIGHT S. HALDAN FAMILY CHARITABLE**

Form 990-PF (2013)

**FOUNDATION 58271-0 &-1**

**71-0865524**

Page **8**

**Part X**

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

<b>1</b> Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
<b>a</b> Average monthly fair market value of securities	<b>1a</b>	<b>1,451,890.</b>
<b>b</b> Average of monthly cash balances	<b>1b</b>	<b>47,507.</b>
<b>c</b> Fair market value of all other assets	<b>1c</b>	
<b>d</b> <b>Total</b> (add lines 1a, b, and c)	<b>1d</b>	<b>1,499,397.</b>
<b>e</b> Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	<b>0.</b>
<b>2</b> Acquisition indebtedness applicable to line 1 assets	<b>2</b>	<b>0.</b>
<b>3</b> Subtract line 2 from line 1d	<b>3</b>	<b>1,499,397.</b>
<b>4</b> Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	<b>4</b>	<b>22,491.</b>
<b>5</b> <b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	<b>1,476,906.</b>
<b>6</b> <b>Minimum investment return.</b> Enter 5% of line 5	<b>6</b>	<b>73,845.</b>

**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.)

<b>1</b> Minimum investment return from Part X, line 6		<b>1</b>	<b>73,845.</b>
<b>2a</b> Tax on investment income for 2013 from Part VI, line 5	<b>2a</b>	<b>1,755.</b>	
<b>b</b> Income tax for 2013. (This does not include the tax from Part VI.)	<b>2b</b>		
<b>c</b> Add lines 2a and 2b	<b>2c</b>	<b>1,755.</b>	
<b>3</b> Distributable amount before adjustments. Subtract line 2c from line 1	<b>3</b>	<b>72,090.</b>	
<b>4</b> Recoveries of amounts treated as qualifying distributions	<b>4</b>	<b>0.</b>	
<b>5</b> Add lines 3 and 4	<b>5</b>	<b>72,090.</b>	
<b>6</b> Deduction from distributable amount (see instructions)	<b>6</b>	<b>0.</b>	
<b>7</b> <b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	<b>7</b>	<b>72,090.</b>	

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

<b>1</b> Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
<b>a</b> Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	<b>1a</b>	<b>352,525.</b>
<b>b</b> Program-related investments - total from Part IX-B	<b>1b</b>	<b>0.</b>
<b>2</b> Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	
<b>3</b> Amounts set aside for specific charitable projects that satisfy the:		
<b>a</b> Suitability test (prior IRS approval required)	<b>3a</b>	
<b>b</b> Cash distribution test (attach the required schedule)	<b>3b</b>	
<b>4</b> <b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	<b>352,525.</b>
<b>5</b> Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	<b>5</b>	<b>1,755.</b>
<b>6</b> <b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	<b>6</b>	<b>350,770.</b>

**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.

Form **990-PF** (2013)

**DWIGHT S. HALDAN FAMILY CHARITABLE  
FOUNDATION 58271-0 &-1**

Form 990-PF (2013)

71-0865524 Page 9

**Part XIII Undistributed Income** (see instructions)

	(a) Corpus	(b) Years prior to 2012	(c) 2012	(d) 2013
<b>1</b> Distributable amount for 2013 from Part XI, line 7				<b>72,090.</b>
<b>2</b> Undistributed income, if any, as of the end of 2013:				
<b>a</b> Enter amount for 2012 only			0.	
<b>b</b> Total for prior years:		0.		
<b>3</b> Excess distributions carryover, if any, to 2013:				
<b>a</b> From 2008				
<b>b</b> From 2009	20,249.			
<b>c</b> From 2010	67,431.			
<b>d</b> From 2011	321,135.			
<b>e</b> From 2012	206,723.			
<b>f</b> Total of lines 3a through e	615,538.			
<b>4</b> Qualifying distributions for 2013 from Part XII, line 4: ▶ \$	352,525.			
<b>a</b> Applied to 2012, but not more than line 2a			0.	
<b>b</b> Applied to undistributed income of prior years (Election required - see instructions)		0.		
<b>c</b> Treated as distributions out of corpus (Election required - see instructions)	0.			
<b>d</b> Applied to 2013 distributable amount				72,090.
<b>e</b> Remaining amount distributed out of corpus	280,435.			
<b>5</b> Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
<b>6</b> Enter the net total of each column as indicated below:	895,973.			
<b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5				
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b		0.		
<b>c</b> 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.		
<b>d</b> Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
<b>e</b> Undistributed income for 2012. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
<b>f</b> Undistributed income for 2013. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2014				0.
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
<b>8</b> Excess distributions carryover from 2008 not applied on line 5 or line 7	0.			
<b>9</b> Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	895,973.			
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2009	20,249.			
<b>b</b> Excess from 2010	67,431.			
<b>c</b> Excess from 2011	321,135.			
<b>d</b> Excess from 2012	206,723.			
<b>e</b> Excess from 2013	280,435.			

Form **990-PF** (2013)

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

**N/A**

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

- b**
- Check box to indicate whether the foundation is a private operating foundation described in section

☐ 4942(j)(3) or ☐ 4942(j)(5)

- 2 a** Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

**b 85% of line 2a**

- c** Qualifying distributions from Part XII,  
line 4 for each year listed .

- d** Amounts included in line 2c not used directly for active conduct of exempt activities

- e Qualifying distributions made directly for active conduct of exempt activities.**

**Subtract line 2d from line 2c**

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

- a "Assets" alternative test - enter:
- (1) Value of all assets

- (2) Value of assets qualifying under section 4942(j)(3)(B)(i)**

- b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed**

- c "Support" alternative test - enter:

- (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

- (2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)**

- (3) Largest amount of support from an exempt organization**

- (4) Gross investment income**

Tax year	Prior 3 years			
(a) 2013	(b) 2012	(c) 2011	(d) 2010	(e) Total
- - - - -	- - - - -	- - - - -	- - - - -	- - - - -

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

## 1 Information Regarding Foundation Managers:

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

**NONE**

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

**NONE**

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

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

- a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed:**

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

- c Any submission deadlines:**

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

**DWIGHT S. HALDAN FAMILY CHARITABLE**

Form 990-PF (2013)

**FOUNDATION 58271-0 &-1**

**71-0865524** Page 11

**Part XV** Supplementary Information (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution **	Amount
<b>a Paid during the year</b>				
ALI SHEPHERD FOUNDATION (CHK 1147)	NONE	TAX EXEMPT CHARITY	GENERAL OR EDUCATIONAL PURPOSES	1,500.
ARIZONA DIAMOND BACKS 401 E JEFFERSON ST PHOENIX, AZ 85004	NONE	TAX EXEMPT CHARITY	GENERAL OR EDUCATIONAL PURPOSES	25,000.
CELEBRITY FIGHT NIGHT 2111 E. HIGHLAND AVE. STE 135 PHOENIX, AZ 85016	NONE	TAX EXEMPT CHARITY	GENERAL PURPOSE	22,500.
CHILDHHELP INC.(TRUST) SCOTTSDALE, AZ 85260	NONE	TAX EXEMPT CHARITY	GENERAL OR EDUCATIONAL PURPOSES	125,000.
COPPER RIDGE PTO 10101 E. THOMPSON PKWY SCOTTSDALE, AZ 85260	NONE	TAX EXEMPT CHARITY	GENERAL OR EDUCATIONAL PURPOSES	610.
<b>Total</b>	<b>SEE CONTINUATION SHEET(S)</b>			<b>351,960.</b>
<b>b Approved for future payment</b>				
NONE				
<b>Total</b>				<b>0.</b>

Form **990-PF** (2013)

\*\* SEE PURPOSE OF GRANT CONTINUATIONS

11

323811  
10-10-13

7100430 758259 058271-000

2013.03040 DWIGHT S. HALDAN FAMILY CHA 058271-1

**Part XV Supplementary Information**

**3 Grants and Contributions Paid During the Year (Continuation)**

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
DIAMONDBACK'S CHARITABLE FOUNDATION (CHK 1102) PO BOX 2095 PHOENIX, AZ	NONE	TAX EXEMPT CHARITY	GENERAL OR EDUCATIONAL PURPOSES	25,850.
EARTHSPAN 7353 MUSSEL LANE CHINCOTEAGUE, VA 23336	NONE	TAX EXEMPT CHARITY	GENERAL OR EDUCATIONAL PURPOSES	5,000.
FOREVER YOUNG FOUNDATION, (FROM TRUST) 1424 S STAPLEY DRIVE MESA, AZ 85204	NONE	TAX EXEMPT CHARITY	GENERAL OR EDUCATIONAL PURPOSES	10,000.
INNOVATIVE SERVICES NW 9414 NE PLAIN RD VANCOUVER, WA 98662	NONE	TAX EXEMPT CHARITY	GENERAL OR EDUCATIONAL PURPOSES	1,000.
LAKE COUNTY JUNIOR LIVESTOCK (CHK 1153)	NONE	TAX EXEMPT CHARITY	GENERAL OR EDUCATIONAL PURPOSES	12,000.
LAKE A WISH ARIZONA 711 E. NORTHERN AVENUE PHOENIX, AZ 85020	NONE	TAX EXEMPT CHARITY	GENERAL OR EDUCATIONAL PURPOSES	1,500.
LAM, INC. P.O. BOX 50940 COLUMBIA, SC 29250	NONE	TAX EXEMPT CHARITY	GENERAL OR EDUCATIONAL PURPOSES	20,500.
PALM SPRINGS CHARITIES, INC (FROM TRUST) INDIAN CANYON DRIVE PALM SPRINGS, CA	NONE	TAX EXEMPT CHARITY	GENERAL OR EDUCATIONAL PURPOSES	40,000.
IAN MATEO HIGH SCHOOL CLASS OF '69 SCHOLARSHIP FUND (CHK 1146) 506 DELAWARE STREET IAN MATEO, CA	NONE	TAX EXEMPT CHARITY	GENERAL OR EDUCATIONAL PURPOSES	2,500.
SONOMA COUNTY CHILDREN'S CHARITIES P.O. BOX 1945 MENDOCINO, CA 95492	NONE	TAX EXEMPT CHARITY	GENERAL OR EDUCATIONAL PURPOSES	17,000.
<b>Total from continuation sheets</b>				<b>177,350.</b>

**71-0865524**

**3 Grants and Contributions Paid During the Year (Continuation)****Total from continuation sheets**

Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
		14	31,329.	
		01	9,830.	
		18	152,295.	
	0.		193,454.	0.
			13	193,454.

## Part XVII

## Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

- |          |  | Yes          | No       |
|----------|--|--------------|----------|
| <b>1</b> | Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?  |              |          |
| <b>a</b> | Transfers from the reporting foundation to a noncharitable exempt organization of:   |              |          |
|          | (1) Cash   | <b>1a(1)</b> | <b>X</b> |
|          | (2) Other assets   | <b>1a(2)</b> | <b>X</b> |
| <b>b</b> | Other transactions:  |              |          |
|          | (1) Sales of assets to a noncharitable exempt organization   | <b>1b(1)</b> | <b>X</b> |
|          | (2) Purchases of assets from a noncharitable exempt organization   | <b>1b(2)</b> | <b>X</b> |
|          | (3) Rental of facilities, equipment, or other assets   | <b>1b(3)</b> | <b>X</b> |
|          | (4) Reimbursement arrangements   | <b>1b(4)</b> | <b>X</b> |
|          | (5) Loans or loan guarantees   | <b>1b(5)</b> | <b>X</b> |
|          | (6) Performance of services or membership or fundraising solicitations   | <b>1b(6)</b> | <b>X</b> |
| <b>c</b> | Sharing of facilities, equipment, mailing lists, other assets, or paid employees   | <b>1c</b>    | <b>X</b> |
| <b>d</b> | If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received. |              |          |

[illegible]

- 2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No
- b** If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

**Sign  
Here**

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

May the IRS discuss this return with the preparer shown below (see Instr.)?

☒ Yes ☐ No

Signature of officer or trustee

Date \_\_\_\_\_

Title

**TRUSTEE**

Print/Type preparer's name

Preparer's signature

Date \_\_\_\_\_

Check ☐ self-employed

PTIN	
------	--

**MYRA WEBSTER**

**MYRA WEBSTER**

04/30/14

**P01521223**

Firm's name ► **WILMINGTON TRUST COMPANY**

Firm's EIN ► 51-0055023

Firm's address ► **1100 NORTH MARKET STREET  
WILMINGTON, DE 19890-0900**

Phone no. **302 651 1772**

Form **990-PF** (2013)



Part XV Supplementary Information

3a Grants and Contributions Paid During the Year Continuation of Purpose of Grant or Contribution

NAME OF RECIPIENT - FOREVER YOUNG FOUNDATION, (FROM TRUST)

GENERAL OR EDUCATIONAL PURPOSES

GENERAL OR EDUCATIONAL PURPOSES

✓

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES				STATEMENT	1
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	
CAPITAL GAINS						
DISTRIBUTIONS	1,033.	1,033.	0.	0.		
DIVIDENDS (NON K1)	6,450.	0.	6,450.	6,450.		
U.S. GOVERNMENT						
INTEREST (NON K1)	61.	0.	61.	61.		
ELMINGTON GL EQ						
K-1 LN 6A	24,818.	0.	24,818.	24,818.		
PART I, LINE 4	32,362.	1,033.	31,329.	31,329.		

FORM 990-PF	OTHER INCOME			STATEMENT	2
DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME		
ELMER NONTAXABLE PRINCIPAL					
EARLAKE	9,830.	0.			
TOTAL TO FORM 990-PF, PART I, LINE 11	9,830.	0.			

FORM 990-PF	OTHER PROFESSIONAL FEES			STATEMENT	3
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
ELMINGTON TRUST CUSTODY					
FEES	7,460.	7,460.		0.	
LEGAL FEES	565.	0.		565.	
FORM 990-PF, PG 1, LN 16C	8,025.	7,460.		565.	

RM 990-PF	TAXES			STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
REIGN TAXES K-1 BOX 16 L	638.	638.		0.	
FORM 990-PF, PG 1, LN 18	638.	638.		0.	

RM 990-PF	OTHER EXPENSES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
RM GLOB EQUITY K1 BOX 13K IER DEDUCTIONS	2,841.	0.		0.	
FORM 990-PF, PG 1, LN 23	2,841.	0.		0.	

M 990-PF	CORPORATE STOCK		STATEMENT	6
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE		
MUAL FUNDS	125,200.	123,618.		
AL TO FORM 990-PF, PART II, LINE 10B	125,200.	123,618.		

M 990-PF	CORPORATE BONDS		STATEMENT	7
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE		
MINGTON MULTI-MGR REAL ASSET FD	58,868.	64,134.		
AL TO FORM 990-PF, PART II, LINE 10C	58,868.	64,134.		

✓

FORM 990-PF OTHER INVESTMENTS STATEMENT 8

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
WILMINGTON GLOBAL EQUITY INDEX FD (FORMERLY BALENTINE)	COST	1,054,340.	1,341,494.
TOTAL TO FORM 990-PF, PART II, LINE 13		1,054,340.	1,341,494.

# Supporting Detail for 990PF Part II Page Two Balance Sheet

Accounts: 058271-000,058271-001 Dwight S. Haldan Family Charitable Foundation

As of Date 12/31/2013

Description	CUSIP	Quantity	Market Value	% MV	Price	Federal Tax Cost	Unrealized Gain/Loss
FIDELITY FOCUSED HIGH INCOME FUND	316146794	2,867 9090	25,811 18	11 00	9 000000	26,535 33	(724 15)
MFS EMERGING MARKETS DEBT FUND - I	55273E640	2,308 7270	33,522 71	14 28	14 520000	35,399 22	(1,876 51)
RIDGEMOUTH SEIX FLOATING RATE HIGH INCOME FUND I	76628T678	3,941 4410	35,709 46	15 21	9 060000	35,000 00	709 46
VANGUARD SHORT-TERM INVESTMENT-GRADE CLASS INVESTOR	922031406	2,670 4870	28,574 21	12 17	10 700000	28,265 78	308 43
WILMINGTON MULTI-MANAGER REAL ASSET FUND INSTITUTIONAL SHARES	97181C431	4,522 6190	64,130 74	27 32	14 180000	58,887 96	5,262 78
WILMINGTON TRUST BANK DEPOSIT SWEEP	822200002	47,004 5700	47,004 57	20 02	1 000000	47,004 57	0 00
<b>TOTAL Principal Portfolio -</b>	<b>USD</b>	<b>63,315.7530</b>	<b>234,752.87</b>	<b>100.00</b>		<b>231,072.86</b>	<b>3,680.01</b>
WILMINGTON TRUST BANK DEPOSIT SWEEP	822200002	417 4000	417 40	100 00	1 000000	417 40	0 00
<b>TOTAL Income Portfolio -</b>	<b>USD</b>	<b>417.4000</b>	<b>417.40</b>	<b>100.00</b>		<b>417.40</b>	<b>0.00</b>
<b>TOTAL 058271-000</b>		<b>63,733.1530</b>	<b>235,170.27</b>	<b>100.00</b>		<b>231,490.26</b>	<b>3,680.01</b>
WILMINGTON GLOBAL EQUITY INDEX FUND SELECT LP (RETENTION CLASS)	99Y496807		1,341,375 37	100 00		1,054,340 00	428,832 29
WILMINGTON TRUST BANK DEPOSIT SWEEP	822200002	0 7300	0 73	0 00	1 000000	0 73	0 00
<b>TOTAL Principal Portfolio -</b>	<b>USD</b>	<b>0.7300</b>	<b>1,341,376.10</b>	<b>100.00</b>		<b>1,054,340.73</b>	<b>428,832.29</b>
<b>TOTAL 058271-001</b>		<b>0.7300</b>	<b>1,341,376.10</b>	<b>100.00</b>		<b>1,054,340.73</b>	<b>428,832.29</b>
M and T Bank Checking xxxx - 3788			\$26,190 00			\$26,190 00	
<b>TOTAL All Accounts All Portfolios</b>			<b>\$1,602,859</b>			<b>\$1,312,021</b>	