



See a Social Security Number? Say Something!  
Report Privacy Problems to <https://public.resource.org/privacy>  
Or call the IRS Identity Theft Hotline at 1-800-908-4490



## Return of Private Foundation

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

Do not enter Social Security numbers on this form as it may be made public.

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>THE CHARLES LAMAR FAMILY FOUNDATION</b>		A Employer identification number <b>72-1488497</b>
Number and street (or P.O. box number if mail is not delivered to street address) <b>P.O. BOX 66338</b>		B Telephone number <b>(225) 924-3527</b>
City or town, state or province, country, and ZIP or foreign postal code <b>BATON ROUGE, LA 70896</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 type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <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>\$ 16,384,274.</b> (Part I, column (d) must be on cash basis.)		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>
J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____		

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		1,245.	1,245.		STATEMENT 1
4 Dividends and interest from securities		129,900.	129,900.		STATEMENT 2
5a Gross rents					
b Net rental income or (loss)		109,000.			
6a Net gain or (loss) from sale of assets not on line 10					
b Gross sales price for all assets on line 6a <b>4,193,762.</b>			109,000.		
7 Capital gain net income (from Part IV, line 2)					
8 Net short-term capital gain					
9 Income modifications Gross sales less returns and allowances					
10a Less Cost of goods sold					
c Gross profit or (loss)		5,813.	5,813.		STATEMENT 3
11 Other income		245,958.	245,958.		
12 Total. Add lines 1 through 11		0.	0.		0.
13 Compensation of officers, directors, trustees, etc.					
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees STMT 4		1,000.	0.		1,000.
c Other professional fees STMT 5		18,257.	18,257.		0.
17 Interest					
18 Taxes STMT 6		5,855.	1,655.		0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses STMT 7		2,235.	0.		2,225.
24 Total operating and administrative expenses. Add lines 13 through 23		27,347.	19,912.		3,225.
25 Contributions, gifts, grants paid		751,674.			751,674.
26 Total expenses and disbursements. Add lines 24 and 25		779,021.	19,912.		754,899.
27 Subtract line 26 from line 12		<533,063.>			
a Excess of revenue over expenses and disbursements			226,046.		
b Net investment income (if negative, enter -0-)					
c Adjusted net income (if negative, enter -0-)				N/A	

<b>Part II Balance Sheets</b> <small>Attached schedules and amounts in the description column should be for end-of-year amounts only</small>		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>Assets</b>	1 Cash - non-interest-bearing	2.	2.	2.
	2 Savings and temporary cash investments	493,889.	543,043.	543,042.
	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 <b>STMT 8</b>	8,140,825.	8,559,101.	13,039,037.
	c Investments - corporate bonds <b>STMT 9</b>	2,388,427.	1,324,956.	1,365,971.
	11 Investments - land, buildings, and equipment basis ▶ Less: accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other <b>STMT 10</b>	1,541,098.	1,604,076.	1,434,064.
	14 Land, buildings, and equipment: basis ▶ Less: accumulated depreciation ▶			
	15 Other assets (describe ▶ <b>ACCURED INCOME</b> )	0.	0.	2,158.
	16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item 1)	12,564,241.	12,031,178.	16,384,274.
<b>Liabilities</b>	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.	
<b>Net Assets or Fund Balances</b>	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	0.	0.	
	28 Paid-in or capital surplus, or land, bldg, and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	12,564,241.	12,031,178.	
	30 Total net assets or fund balances	12,564,241.	12,031,178.	
	31 Total liabilities and net assets/fund balances	12,564,241.	12,031,178.	

**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 12,564,241.
2 Enter amount from Part I, line 27a	2 <533,063.>
3 Other increases not included in line 2 (itemize) ▶	3 0.
4 Add lines 1, 2, and 3	4 12,031,178.
5 Decreases not included in line 2 (itemize) ▶	5 0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6 12,031,178.

**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)
<b>1a</b>			
<b>b</b> SEE ATTACHED STATEMENT			
<b>c</b>			
<b>d</b>			
<b>e</b>			

(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</b>			
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b> 4,193,762.		4,084,762.	109,000.

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

(i) FMV 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))
<b>a</b>			
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			109,000.

<b>2</b> Capital gain net income or (net capital loss) $\left\{ \begin{array}{l} \text{If gain, also enter in Part I, line 7} \\ \text{If (loss), enter -0- in Part I, line 7} \end{array} \right\}$	<b>2</b>	109,000.
<b>3</b> 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	<b>3</b>	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	691,528.	12,802,136.	.054017
2011	555,025.	11,338,253.	.048952
2010	379,833.	10,223,278.	.037154
2009	337,687.	6,770,350.	.049877
2008	426,863.	7,933,868.	.053803

<b>2</b> Total of line 1, column (d)	<b>2</b>	.243803
<b>3</b> 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	<b>3</b>	.048761
<b>4</b> Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	<b>4</b>	15,180,751.
<b>5</b> Multiply line 4 by line 3	<b>5</b>	740,229.
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)	<b>6</b>	2,260.
<b>7</b> Add lines 5 and 6	<b>7</b>	742,489.
<b>8</b> 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	<b>8</b>	754,899.

**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	2,260.
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)	2	0.
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	3	2,260.
3	Add lines 1 and 2	4	0.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	5	2,260.
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		
6	Credits/Payments		
a	2013 estimated tax payments and 2012 overpayment credited to 2013	6a	2,838.
b	Exempt foreign organizations - tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	3,000.
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d	7	5,838.
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	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	3,578.
11	Enter the amount of line 10 to be Credited to 2014 estimated tax <input checked="" type="checkbox"/> 565. Refunded <input checked="" type="checkbox"/>	11	3,013.

**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
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation. <input checked="" type="checkbox"/> \$ 0. (2) On foundation managers <input checked="" type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input checked="" type="checkbox"/> \$ 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?		X
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) <input checked="" type="checkbox"/> LA		
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)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ► N/A

14 The books are in care of ► CAROLE E. LAMAR Telephone no ► (225) 924-3527  
 Located at ► 5321 CORPORATE BLVD., BATON ROUGE, LA ZIP+4 ► 70808

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 N/A

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 ►

	Yes	No
16		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?	<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)?	<u>N/A</u>	1b
Organizations relying on a current notice regarding disaster assistance check here ► <input type="checkbox"/>		
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?	<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.)	<u>N/A</u>	2b
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ►		
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.)	<u>N/A</u>	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)?

☐ 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)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☒**c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945-5(d).

**6a** Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?☐ Yes ☒ No**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

6b

X

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?

N/A

7b

**Part VIII** Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 11		0.	0.	0.

**2** 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

Form 990-PF (2013)





**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>	14,694,369.
<b>b</b>	Average of monthly cash balances	<b>1b</b>	717,561.
<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>	15,411,930.
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	0.
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b>	0.
<b>3</b>	Subtract line 2 from line 1d	<b>3</b>	15,411,930.
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	<b>4</b>	231,179.
<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>	15,180,751.
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5	<b>6</b>	759,038.

**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>	759,038.
<b>2a</b>	Tax on investment income for 2013 from Part VI, line 5	<b>2a</b>	2,260.
<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>	2,260.
<b>3</b>	<b>Distributable amount before adjustments.</b> Subtract line 2c from line 1	<b>3</b>	756,778.
<b>4</b>	Recoveries of amounts treated as qualifying distributions	<b>4</b>	0.
<b>5</b>	Add lines 3 and 4	<b>5</b>	756,778.
<b>6</b>	Deduction from distributable amount (see instructions)	<b>6</b>	0.
<b>7</b>	<b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1	<b>7</b>	756,778.

**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>	754,899.
<b>b</b>	Program-related investments - total from Part IX-B	<b>1b</b>	0.
<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>	754,899.
<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>	2,260.
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	<b>6</b>	752,639.

**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)

**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				756,778.
<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				
<b>c</b> From 2010				
<b>d</b> From 2011				
<b>e</b> From 2012				21,157.
<b>f</b> Total of lines 3a through e	21,157.			
<b>4</b> Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 754,899.				
<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				754,899.
<b>e</b> Remaining amount distributed out of corpus	0.			
<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).)	1,879.			1,879.
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	19,278.			
<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	19,278.			
<b>10</b> Analysis of line 9				
<b>a</b> Excess from 2009				
<b>b</b> Excess from 2010				
<b>c</b> Excess from 2011				
<b>d</b> Excess from 2012	19,278.			
<b>e</b> Excess from 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**

[illegible]

**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

SEE STATEMENT 12

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

- c Any submission deadlines:**

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

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>a</b> <i>Paid during the year</i>				
SEE ATTACHED SCHEDULE	NONE	501(C)(3)	CHARITABLE	751,674.
<b>Total</b>			<b>3a</b>	751,674.
<b>b</b> <i>Approved for future payment</i>				
SEE ATTACHED SCHEDULE	NONE	501(C)(3)	CHARITABLE	355,140.
<b>Total</b>			<b>3b</b>	355,140.



**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   | 1a(1) | X  |
|          | (2) Other assets   | 1a(2) | X  |
| <b>b</b> | Other transactions   |       |    |
|          | (1) Sales of assets to a noncharitable exempt organization   | 1b(1) | X  |
|          | (2) Purchases of assets from a noncharitable exempt organization   | 1b(2) | X  |
|          | (3) Rental of facilities, equipment, or other assets   | 1b(3) | X  |
|          | (4) Reimbursement arrangements   | 1b(4) | X  |
|          | (5) Loans or loan guarantees   | 1b(5) | X  |
|          | (6) Performance of services or membership or fundraising solicitations   | 1b(6) | X  |
| <b>c</b> | Sharing of facilities, equipment, mailing lists, other assets, or paid employees   | 1c    | X  |
| <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  |                          |                                 |
|  |                          |                                 |
|  |                          |                                 |
|  |                          |                                 |
|  |                          |                                 |


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.

**Sign Here**     **OFFICER**

Signature of officer or trustee \_\_\_\_\_ Title \_\_\_\_\_

Date 11/12/14

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

<b>Paid Preparer Use Only</b>	Print/Type preparer's name	Preparer's signature	Date	Check <input type="checkbox"/> if self-employed	PTIN
	BRANDON LAGARDE		11/2/14		P01428217
	Firm's name ▶ POSTLETHWAITE & NETTERVILLE			Firm's EIN ▶ 72-1202445	
	Firm's address ▶ 8550 UNITED PLAZA BLVD, SUITE 1001 BATON ROUGE, LA 70809			Phone no. (225) 922-4600	

Charles Lamar Family Foundation  
 EIN: 72-1488497  
 Schedule of Assets Held in JPMorgan Investment Account  
 As of: 12/31/13

Description	Quantity	Ending Cost	FMV
JPM CORE BOND FD - SEL FUND 3720 2.23%	25,441.79	272,770.30	291,817.35
<b>TOTAL JPMORGAN CORE BOND FUND</b>		<b>272,770.30</b>	<b>291,817.35</b>
JPM HIGH YIELD FD - SEL FUND 3580 5.37%	20,056.99	141,378.69	160,054.79
<b>TOTAL JPMORGAN HIGH YIELD BOND FUND</b>		<b>141,378.69</b>	<b>160,054.79</b>
DOUBLELINE TOTAL RET BD-I	26,086.35	289,819.33	281,210.83
EATON VANCE FLOATING RATE-I	26,300.02	230,987.61	241,697.16
JPM STRAT INCOME OPPORT FD - SEL FUND 3844 2.24%	12,658.23	150,000.00	150,506.33
METROPOLITAN WEST FDS TOTAL RET CL I	22,813.69	240,000.00	240,684.41
<b>TOTAL OTHER FIXED INCOME</b>		<b>910,806.94</b>	<b>914,098.73</b>
CULLEN HIGH DIVIDEND EQ-I	7,915.99	97,909.35	132,434.58
DODGE & COX INTL STOCK FUND	5,676.79	235,682.43	244,329.08
FMI LARGE CAP FUND LARGE CAP FD	10,375.33	115,710.13	216,429.28
ISHARES CORE S&P MID-CAP ETF	1,760.00	156,531.69	235,505.60
ISHARES MSCI EAFE INDEX FUND	2,500.00	155,212.68	167,737.50
JPM CHINA REGION FD - SEL FUND 3810	3,045.69	60,000.00	64,690.35
JPM INTREPID EUROPEAN FD - INSTL FUND 1300	5,379.86	120,000.00	143,803.71
JPM LARGE CAP GROWTH FD - SEL FUND 3118	4,506.67	97,839.85	143,222.04
JPM SMALL CAP EQUITY FD - SEL FUND 367	4,406.99	139,878.61	218,366.16
JPM US LARGE CAP CORE PLUS FD - SEL FUND 1002	9,253.22	216,202.05	256,684.27
MATTHEWS PACIFIC TIGER FD-IS	7,394.93	140,351.98	184,651.48
MFS INTL VALUE-I	11,546.58	341,932.08	406,208.61
SIT DIVIDEND GROWTH FUND-I	12,177.12	165,000.00	215,047.97
SPDR S&P 500 ETF TRUST	2,113.00	295,877.69	390,249.97
VIRTUS EMERGING MKTS OPPOR-I	6,598.99	65,000.00	63,020.31
<b>TOTAL EQUITIES IN JPM "A" ACCT</b>		<b>2,403,128.54</b>	<b>3,082,380.91</b>
BARC BEN BRENT 09/29/14 LNKD TO CO1 85% BARRIER- 5.47%	30,000.00	30,000.00	30,495.00
EATON VANCE GLOBAL MACRO-I	8,794.26	84,949.59	82,841.94
FUNDVANTAGE TR ABS RTR INSTL	12,751.16	165,000.00	165,000.00
INV BALANCED-RISK ALLOC-Y	14,584.89	185,000.00	173,414.31
PIMCO COMMODITYPL STRAT-P	13,192.16	144,586.02	140,760.29
PIMCO UNCONSTRAINED BOND-P	18,707.03	215,000.00	207,461.01
SG LEV COMMODITY CBEN 4/2/14 LNKD TO CO1 CT PLDMLN	55,000.00	55,000.00	52,954.00
THE ARBITRAGE FUND-I	6,456.95	82,890.63	83,036.40
DB MARKET PLUS SX5E 03/19/14 80% CONTIN BARRIER- 7.6%	65,000.00	65,000.00	78,055.90
JPM BREN MXEA 04/16/14 10%BUFFER-1.50 XLEV- 6.60%CAP	65,000.00	65,000.00	70,291.00
JPM REN MXASJ 03/26/14 2 XLEV- 9.75%CAP- 19.5%MAXPYMT	65,000.00	65,000.00	65,253.50
JPM REN MXEA 10/16/14 2 XLEV- 10%CAP- 20%MAXPYMT INIT	80,000.00	80,000.00	82,568.00
SG REN SPX 10/16/14 2 XLEV- 8%CAP- 16%MAXPYMT INITIAL I	100,000.00	100,000.00	106,730.00
HSBC 100%PP CNY REN 5/15/14 LNKD TO CNY 1.48XLEV, 0%	50,000.00	51,198.29	51,570.00
SG PIMS 90%PPN 2/3/14 LNKD TO PLD,IDR,MXN & KRW VS U	50,000.00	50,431.72	46,936.20
<b>TOTAL LINKED SECURITIES &amp; OTHER INVESTMENTS</b>		<b>1,439,058.25</b>	<b>1,437,367.55</b>

**Charles Lamar Family Foundation**  
**EIN: 72-1488497**  
**Grants/Contributions Paid During the Year**  
**FYE: 12/31/13**

<b>Recipient Name and Address</b>	<b>Status of Recipient</b>	<b>Purpose of grant or contribution</b>	<b>Amount</b>
Arts Council of Greater Baton Rouge/ Louisiana International Film Festival 427 Laurel St. Baton Rouge, LA 70801	501(c)(3)	Charitable - Funding for April film festival	3,500
Baton Rouge Crisis Intervention Ctr Found 4837 Revere Ave. Baton Rouge, LA 70808	501(c)(3)	Charitable - Baton Rouge Public Awareness Campaign	25,000
Baton Rouge International School Foundation 5015 Autoplex Dr. Baton Rouge, LA 70809	501(c)(3)	Charitable - Support for new school building	50,000
Baton Rouge Irish Club P.O. Box 64972 Baton Rouge, LA 70896	501(c)(3)	Charitable - Funding for July film festival	3,268
Baton Rouge Symphony Orchestra 7330 Highland Rd. Baton Rouge, LA 70808	501(c)(3)	Charitable - April concert - Lamar Chamber Series	1,442
Baton Rouge Youth Coalition 611 North Street Baton Rouge, LA 70802	501(c)(3)	Charitable - BRYC Core Programs 2013-2014 start up operating expenses	30,000
Boston University 595 Commonwealth Ave. Boston, MA 02215	501(c)(3)	Charitable - Support for 2 summer internships	10,000
CARE USA 151 Ellis St., NE Atlanta, GA	501(c)(3)	Charitable - Water Sanitation and Hygiene Program in the Garrison District of Kenya	50,000
Center for Planning Excellence 100 Lafayette St. Baton Rouge, LA 70801	501(c)(3)	Charitable Future BR & sustainability development strategies	15,000
City Year Louisiana 111 North 3rd Street Baton Rouge, LA 70801	501(c)(3)	Charitable - Champion Circle - Member pledge	10,000
Companion Animal Alliance c/o BRAF 402 N. 4th St. Baton Rouge, LA 70802	501(c)(3)	Charitable -- Feral Cat Federation Project	60,500
Greater Baton Rouge Food Bank 5546 Choctaw Dr. Baton Rouge, LA 70805	501(c)(3)	Charitable - "From Hunger to Hope" Capital Campaign & funds for repacking equipment	40,000



**Charles Lamar Family Foundation**  
**EIN: 72-1488497**  
**Grants/Contributions Paid During the Year**  
**FYE: 12/31/13**

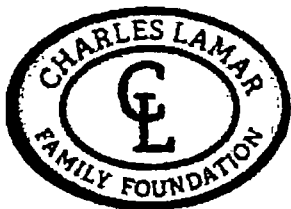
<b>Recipient Name and Address</b>	<b>Status of Recipient</b>	<b>Purpose of grant or contribution</b>	<b>Amount</b>
Habitat for Humanity of Greater Baton Rouge 6554 Florida Blvd., Suite 200 Baton Rouge, LA 70806	501(c)(3)	Charitable - Building of 300th home in Baton Rouge	3,000
Lousiana Key Academy P.O. Box 80531 Baton Rouge, LA 70898	501(c)(3)	Charitable - Renovation of shopping center to house new charter school	50,000
LSU Museum of Art 100 Lafayette St. Baton Rouge, LA 70801	501(c)(3)	Charitable - Title partner for Walter Inglis Anderson Exhibit - Fall 2013	10,000
Manners of the Heart 215 Royal St. Baton Rouge, LA 70802	501(c)(3)	Charitable - Support of expansion plans - specifically the "home connection" program (LaBelle Aire Elementary)	17,271
MetroMorphosis 1400 North Foster Dr. Baton Rouge, LA 70806	501(c)(3)	Charitable - Urban Leadership Development Initiative	10,000
New Schools for Baton Rouge 100 Lafayette St., Floor 2 Baton Rouge, LA 70801	501(c)(3)	Charitable - Support for "Excellence Fund"	50,000
New Venture Theatre P.O. Box 45792 Baton Rouge, LA 70895	501(c)(3)	Charitable- Theatre rental - December 7 (Arts Council/Shaw Center Project)	1,927
Of Moving Colors Productions P.O. Box 14700 Baton Rouge, LA 70898	501(c)(3)	Charitable- Kick it Out & P.S. 425	6,594
Opera Louisiane P.O. Box 4908 Baton Rouge, LA 70821	501(c)(3)	Charitable - Theater rental - "The Ring" performances (Arts Council/Shaw Center Project)	1,735
Pennington Biodomedical Research Foundation 6400 Perkins Road Baton Rouge, LA 70808	501(c)(3)	Charitable - Institute for Dementia Research and Prevention	60,000
Public Affairs Research Council of LA P.O. Box 14776 Baton Rouge, LA 70898	501(c)(3)	Charitable - Impact of New Technology Based Learning Systems on LA Schools	10,000
Sexual Trauma Awareness & Response Center 8281 Goodwood Blvd. Ste. 1-2 Baton Rouge, LA 70802	501(c)(3)	Charitable - Manship rental	1,437

**Charles Lamar Family Foundation**  
**EIN: 72-1488497**  
**Grants/Contributions Paid During the Year**  
**FYE: 12/31/13**

<b><i>Recipient Name and Address</i></b>	<b><i>Status of Recipient</i></b>	<b><i>Purpose of grant or contribution</i></b>	<b><i>Amount</i></b>
Stand for Children Louisiana 10101 Park Row Avenue, Suite 180 Baton Rouge, LA 70810	501(c)(3)	Charitable - Stand UP program - Lanier Elementary	25,000
Swine Palace Productions 105 Music & Dramatic Arts Building Louisiana State University Baton Rouge, LA 70803	501(c)(3)	Charitable - Support for programs allowing at-risk students access to profesional live theatre	6,000
THRIVE Baton Rouge 6810 Jefferson Hwy. #8203 Baton Rouge, LA 70806	501(c)(3)	Charitable - Pledge installment - new school facility construction	200,000
Total			751,674

**Charles Lamar Family Foundation**  
**EIN: 72-1488497**  
**Grants/Contributions Approved For Future Payment**  
**FYE: 12/31/13**

<i><b>Recipient Name and Address</b></i>	<i><b>Status of Recipient</b></i>	<i><b>Purpose of grant or contribution</b></i>	<i><b>Amount</b></i>	<i><b>Scheduled Payment Date(s)</b></i>
Baton Rouge International School Foundation 5015 Autoplex Dr. Baton Rouge, LA 70809	501(c)(3)	Charitable - Support for new school building	50,000	Dec 2014
Center for Planning Excellence 100 Lafayette St. Baton Rouge, LA 70801	501(c)(3)	Charitable Future BR & sustainability development strategies	15,000	Dec 2014
City Year Louisiana 111 North 3rd Street Baton Rouge, LA 70801	501(c)(3)	Charitable - Champion Circle - Member pledge	20,000	1/2 July 2014 1/2 July 2015
Manners of the Heart 215 Royal St. Baton Rouge, LA 70802	501(c)(3)	Charitable - Support of expansion plans - specifically the "home connection" program	20,140	July 2014
New Schools for Baton Rouge 100 Lafayette St., Floor 2 Baton Rouge, LA 70801	501(c)(3)	Charitable - Support for "Excellence Fund"	50,000	Dec 2014
THRIVE Baton Rouge 6810 Jefferson Hwy. #8203 Baton Rouge, LA 70806	501(c)(3)	Charitable - New school facility construction	200,000	1/2 Sept 2014 1/2 Sept 2015
Total			355,140	



Em info@lamarfamilyfoundation.org / Ph (225) 924-3527

[HOME](#)[ABOUT](#)[HOW TO APPLY](#)[RECENT GRANTS](#)[CONTACT US](#)[Who's eligible for a grant?](#)

# The Charles Lamar Family Foundation

## INFORMATION FOR GRANT APPLICANTS

---

### Information for Grant Applicants

Organizations applying for grants should draft a proposal using the following checklist.

#### Proposal Summary

[Click here to fill out the Proposal Summary form online.](#)

[Click here to download a PDF in order to mail your application.](#)

#### Narrative Section

The application should be concise and should include the following information:

- Concise history of the organization with an overview of current programs and activities.
- Description of the challenge to be met by the project.
- Detailed description of the project, including strategies, measurable objectives and a timetable.
- Plan for continuing the project once the Foundation's funding ends.
- Plan for evaluating the project.

#### Attachments

Attachments should include the following information and should be no longer than ten pages:

- Names and qualifications of persons responsible for carrying out the program.
- Detailed project budget and budget narrative, including income sources and expenditures, as well as a list of other requests for funding, including those received, approved or pending.
- A list of the organization's board members including the board members' principal occupations and terms of office.
- Financial statements, including the organization's operating budget, balance sheet and statements of support, revenue and expenses for the last completed and current fiscal year.

- Statement from the organization's board of directors authorizing the request and agreeing to implement the project if funded.
- Copy of the Internal Revenue Service notice stating that the organization is tax-exempt or a copy of the organization's fiscal agent's 501(c)(3) with a letter from that organization stating its willingness to serve.

#### **Mailing Instructions (for those not using the online application)**

Applicants should mail **two** copies of the completed proposal (including supporting material) to:

Charles Lamar Family Foundation  
P. O. Box 66338  
Baton Rouge, LA 70896

or deliver to Woodlawn Investments, Inc., 5321 Corporate Blvd., 3rd Floor, Baton Rouge, LA 70808.

For further information on the Foundation, grant applications or timelines, please write Charles Lamar at the address above, call (225) 924-3527, or email [clamar@lamar.com](mailto:clamar@lamar.com).

## **Steps for Applying**

- ❶ Visit the Information Sheet for detailed instructions.
- ❷ Fill out the Proposal Summary form (also available as a PDF).
- ❸ After the project has been completed, please fill out the Final Report form (also available as a PDF).

## **Application Deadlines**

June Round – May 1

December Round – Nov 1

© 2014 CHARLES LAMAR FAMILY FOUNDATION

- [Home /](#)
- [About /](#)
- [How to Apply /](#)
- [Recent Grants /](#)
- [Contact Us](#)

# CHARLES LAMAR FAMILY FOUNDATION

## Proposal Summary Sheet

*Please type. If you recreate this on your computer, include all the requested information. One page limit.*

Applicant Organization's Name: \_\_\_\_\_

Date incorporated as a 501(c)3: \_\_\_\_\_ OR \_\_\_\_\_ Applied for 501(c)3; not awarded yet.

Program or Project Name: \_\_\_\_\_

Executive Director (if none, Board President): \_\_\_\_\_

Program or Project Director: \_\_\_\_\_

Address, City, State, Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ E-mail: \_\_\_\_\_

Web Page: \_\_\_\_\_

Fiscal Agent's Name (if applicable): \_\_\_\_\_  
\_\_\_\_\_ Fiscal agent's 501(c)3 verification and letter of agreement enclosed

\$ \_\_\_\_\_

_____ Animal Welfare	_____ Conservation/Preservation	_____ Social Services
_____ Arts/Culture	_____ Education	_____ Other
_____ Community Development	_____ Medical/Health	

_____ Names/Qualifications of Staff	_____ 501(c)3 Verification	_____ Board List
_____ Program/Project Budget	_____ Board Authorization	
_____ Brochure, Clipping, Etc. (Optional)	_____ Last and This Fiscal Year's Financial Statements	

Charles Lamar Family Foundation  
 EIN: 72-1488497  
 Net Gain/(Loss) from Sales of Assets  
 FYE: 12/31/13

Description	Quantity	Proceeds	Cost Basis	ST Gain/(Loss)	LT Gain/(Loss)	Total Gain/(Loss)
3ARC 95% PPN FX BASKET 1/22/13 LNKE TO BRL INF	(45,000)	42,750	45,865	-	(2,915)	(2,915)
3NP BREN SPX 04/24/13 10%BUFFER-2 XLEV- 5.25% C/	(65,000)	71,825	65,000	-	6,825	6,825
CS BREN EAFE 08/28/13 10%BUFFER-2 XLEV- 9.6%CA	(65,000)	77,480	65,000	-	12,480	12,480
DOUBLELINE TOTAL RET BD-I	(4,517)	50,000	50,181	-	(181)	(181)
DREYFUS EMG MKT DEBT LOC C-I	(8,080)	110,858	114,190	-	(3,334)	(3,334)
EATON VANCE FLOATING RATE-I	(14,780)	135,000	133,511	-	1,489	1,489
EATON VANCE GLOBAL MACRO-I	(6,054)	60,000	61,547	-	(1,547)	(1,547)
GATEWAY FUND-Y	(5,804)	162,358	150,000	1,173	11,185	12,358
GS BREN SPX 5/22/13 10%BUFFER-2 XLEV- 5.6%CAP 1	(110,000)	122,320	110,000	-	12,320	12,320
HIGHBRIDGE DYN COMMOD STR FD - SEL FUND 2015	(13,802)	192,400	265,000	-	(72,600)	(72,600)
ISHARES CORE S&P MID-CAP ETF	(545)	59,376	45,788	-	13,578	13,578
JPM BREN EAFE 0 04/04/13 10%BUFFER-2 XLEV- 9.5%I	(65,000)	67,550	65,000	-	2,550	2,550
JPM BREN EAFE 05/15/13 10%BUFFER-2 XLEV- 10.10%	(65,000)	77,621	65,000	-	12,621	12,621
JPM CONT BUFF EQ SPX 8/28/13 80% CONTIN BARRIE	(110,000)	126,500	110,000	-	16,500	16,500
JPM CORE BD FD - SEL FUND 3720 2.16%	(87,393)	1,054,218	950,506	24	103,688	103,712
JPM HIGH YIELD FD - SEL FUND 3580 4.13%	(16,796)	130,782	132,366	(251)	(1,333)	(1,584)
JPM INTL CURR INC FD - SEL FUND 3831 1.01%	(9,279)	103,000	104,491	-	(1,491)	(1,491)
JPM PARTICIPATING GOLD NOTE 11/07/13 LNKD TO G	(65,000)	50,019	65,000	-	(14,981)	(14,981)
JPM US RE FD - SEL FUND 3037	(5,902)	96,914	74,310	-	22,604	22,604
PIMCO COMMODITYPL STRAT-P	(4,600)	50,000	50,414	(414)	-	(414)
PIMCO TOTAL RETURN FUND-INST	(27,580)	293,728	310,000	(16,272)	-	(16,272)
PRUDENTIAL TOTAL RETURN BD-Z	(8,532)	118,174	124,987	(6,813)	-	(6,813)
SPDR S&P 500 ETF TRUST	(850)	146,034	124,354	1,413	20,267	21,680
T ROWE PRICE NEW ASIA	(8,473)	129,809	146,022	-	(18,212)	(18,212)
THE ARBITRAGE FUND-I	(7,031)	90,000	92,109	-	(2,109)	(2,109)
VANGUARD FTSE EMERGING MARKETS ETF	(3,828)	152,816	173,894	(6,212)	(14,866)	(21,078)
ST		694,512	721,864	(27,351)		
LT		3,077,018	2,974,481		102,537	
		3,771,530	3,696,344			75,186
Cost adjustments:						
PRUDENTIAL TOTAL RETURN BD-Z		-	13	(13)		
EATON VANCE GLOBAL MACRO-I		-	65		(65)	
JPM INTL CURR INC FD - SEL FUND 3831 1.01%		-	48		(48)	
Total cost adjustments			124	(13)	(11)	(124)
Adjust Gain/Loss		3,771,530	3,696,469	(27,365)	102,426	75,061

## FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
JPMORGAN A ACCOUNT	30.	30.	
JPMORGAN A ACCOUNT-OLD	1,171.	1,171.	
JPMORGAN W ACCOUNT	44.	44.	
TOTAL TO PART I, LINE 3	1,245.	1,245.	

## FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
JPMORGAN A ACCOUNT	189,874.	59,974.	129,900.	129,900.	
TO PART I, LINE 4	189,874.	59,974.	129,900.	129,900.	

## FORM 990-PF OTHER INCOME STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
JPMORGAN A 4838-00-4	88.	88.	
PFIC INCOME	5,725.	5,725.	
TOTAL TO FORM 990-PF, PART I, LINE 11	5,813.	5,813.	



## FORM 990-PF

## ACCOUNTING FEES

STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	1,000.	0.		1,000.
TO FORM 990-PF, PG 1, LN 16B	1,000.	0.		1,000.

## FORM 990-PF

## OTHER PROFESSIONAL FEES

STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT MANAGEMENT	18,257.	18,257.		0.
TO FORM 990-PF, PG 1, LN 16C	18,257.	18,257.		0.

## FORM 990-PF

## TAXES

STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
2012 TAXES	2,000.	0.		0.
2013 TAXES	2,200.	0.		0.
FOREIGN TAX EXPENSE	1,655.	1,655.		0.
TO FORM 990-PF, PG 1, LN 18	5,855.	1,655.		0.

## FORM 990-PF

## OTHER EXPENSES

STATEMENT 7

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
MEMBERSHIPS	2,225.	0.		2,225.
MISCELLANEOUS	10.	0.		0.
TO FORM 990-PF, PG 1, LN 23	2,235.	0.		2,225.

---



---

FORM 990-PF	CORPORATE STOCK	STATEMENT	8
-------------	-----------------	-----------	---

---

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
190,558 SHARES OF LAMAR ADVERTISING CO. STOCK	6,155,973.	9,956,656.
EQUITIES - A ACCT-SEE ATTACHED SCHEDULE	2,403,128.	3,082,381.
TOTAL TO FORM 990-PF, PART II, LINE 10B	8,559,101.	13,039,037.

---



---

FORM 990-PF	CORPORATE BONDS	STATEMENT	9
-------------	-----------------	-----------	---

---

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
JP MORGAN ST BOND FUND	272,770.	291,817.
JP MORGAN HIGH YIELD BOND FUND	141,379.	160,055.
OTHER FIXED INCOME	910,807.	914,099.
TOTAL TO FORM 990-PF, PART II, LINE 10C	1,324,956.	1,365,971.

---



---

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	10
-------------	-------------------	-----------	----

---

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
LINKED SECURITIES & OTHER INVESTMENTS	COST	1,439,056.	1,437,368.
HIGHBRIDGE CAPITAL CORPORATION	COST	165,080.	12,696.
LAMAR PUTS/CALLS	COST	<60.>	<16,000.>
TOTAL TO FORM 990-PF, PART II, LINE 13		1,604,076.	1,434,064.

FORM 990-PF

PART VIII - LIST OF OFFICERS, DIRECTORS  
TRUSTEES AND FOUNDATION MANAGERS

STATEMENT 11

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
CHARLES W. LAMAR III 5321 CORPORATE BLVD. BATON ROUGE, LA 70808	PRESIDENT 0.00	0.	0.	0.
CAROLE E. LAMAR 5321 CORPORATE BLVD. BATON ROUGE, LA 70808	SECRETARY/TREASURER 0.00	0.	0.	0.
ALLISON LAMAR BEARD 5321 CORPORATE BLVD. BATON ROUGE, LA 70808	DIRECTOR 0.00	0.	0.	0.
COURTNEY J. LAMAR 5321 CORPORATE BLVD. BATON ROUGE, LA 70808	DIRECTOR 0.00	0.	0.	0.
MADISON C. LAMAR 5321 CORPORATE BLVD. BATON ROUGE, LA 70808	DIRECTOR 0.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		0.	0.	0.

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION  
PART XV, LINES 2A THROUGH 2D

STATEMENT 12

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

CHARLES LAMAR FAMILY FOUNDATION  
P.O. BOX 66338  
BATON ROUGE, LA 70896

TELEPHONE NUMBER

(225) 924-3527

FORM AND CONTENT OF APPLICATIONS

SEE ATTACHED

ANY SUBMISSION DEADLINES

VARIES

RESTRICTIONS AND LIMITATIONS ON AWARDS

DONEE ORGANIZATIONS ARE GENERALLY LIMITED TO THOSE LOCATED IN OR NEAR THE  
BATON ROUGE, LA AREA IN THE FIELDS OF SOCIAL SERVICES, ARTS AND CULTURE,  
EDUCATION, ANIMAL WELFARE, AND NATURAL AND HISTORIC CONSERVATION.

THE CHARLES LAMAR FAMILY FOUNDATION

**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 JPMORGAN A 48368-00-4-SEE ATTACHED	P		
b JPMORGAN A 48368-00-4-SEE ATTACHED	P		
c LAMAR ADVERTISING COMPANY-CALL OPTIONS EXPIRED	P		
d LAMAR ADVERTISING COMPAN-PUT OPTIONS EXPIRED	P		
e 7500 SHARES LAMAR ADVERTISING COMPANY	P	09/08/07	05/15/13
f CAPITAL GAINS DIVIDENDS			
g			
h			
i			
j			
k			
l			
m			
n			
o			

(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 694,512.		721,877.	<27,365.>
b 3,077,018.		2,974,592.	102,426.
c		<8,296.>	8,296.
d		7,339.	<7,339.>
e 362,258.		389,250.	<26,992.>
f 59,974.			59,974.
g			
h			
i			
j			
k			
l			
m			
n			
o			

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) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
a			<27,365.>
b			102,426.
c			8,296.
d			<7,339.>
e			<26,992.>
f			59,974.
g			
h			
i			
j			
k			
l			
m			
n			
o			

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	109,000.
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

# Application for Extension of Time To File an Exempt Organization Return

OMB No. 1545-1709

Department of the Treasury  
Internal Revenue Service

► File a separate application for each return.  
► Information about Form 8868 and its instructions is at [www.irs.gov/form8868](http://www.irs.gov/form8868)

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒ **X**
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form).

**Do not complete Part II unless** you have already been granted an automatic 3-month extension on a previously filed Form 8868.

**Electronic filing (e-file)** You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit [www.irs.gov/efile](http://www.irs.gov/efile) and click on **e-file for Charities & Nonprofits**.

## Part I Automatic 3-Month Extension of Time. Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete

Part I only ☐

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

Type or print	Name of exempt organization or other filer, see instructions.	Enter filer's identifying number
File by the due date for filing your return. See instructions.	<b>THE CHARLES LAMAR FAMILY FOUNDATION</b>	Employer identification number (EIN) or <b>72-1488497</b>
	Number, street, and room or suite no. If a P.O. box, see instructions. <b>P.O. BOX 66338</b>	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. <b>BATON ROUGE, LA 70896</b>	

Enter the Return code for the return that this application is for (file a separate application for each return)

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720 (other than individual)	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

**CAROLE E. LAMAR**

• The books are in the care of ► **5321 CORPORATE BLVD. - BATON ROUGE, LA 70808**

Telephone No. ► **(225) 924-3527** Fax No. ► **(225) 924-3537**

• If the organization does not have an office or place of business in the United States, check this box ☐

• If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) . If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for.

- 1** I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until **AUGUST 15, 2014**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:
- ☒ calendar year **2013** or
- ☐ tax year beginning  , and ending

- 2** If the tax year entered in line 1 is for less than 12 months, check reason: ☐ Initial return ☐ Final return ☐ Change in accounting period

<b>3a</b> If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	<b>3a</b>	\$	<b>5,838.</b>
<b>b</b> If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	<b>3b</b>	\$	<b>2,838.</b>
<b>c Balance due.</b> Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	<b>3c</b>	\$	<b>3,000.</b>

**Caution.** If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** and check this box ☒ **Note.** Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868.
- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** (on page 1).

**Part II Additional (Not Automatic) 3-Month Extension of Time.** Only file the original (no copies needed).

Enter filer's identifying number, see instructions

Type or print  File by the due date for filing your return. See instructions.	Name of exempt organization or other filer, see instructions. <b>The Charles Lamar Family Foundation</b>	Employer identification number (EIN) or <b>72-1488497</b>
	Number, street, and room or suite no. If a P.O. box, see instructions. <b>5321 Corporate Blvd.</b>	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. <b>Baton Rouge, LA 70808</b>	

Enter the Return code for the return that this application is for (file a separate application for each return) 04

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01		
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720 (other than individual)	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

**STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.**

- The books are in the care of ☐ **Entity** Telephone No. ☐ Fax No. ☐
- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ☐ . If this is for the whole group, check this box ☐ . If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for.

- 4 I request an additional 3-month extension of time until November 15, 20 14.
- 5 For calendar year 2013, or other tax year beginning 20, and ending 20.
- 6 If the tax year entered in line 5 is for less than 12 months, check reason: ☐ Initial return ☐ Final return ☐ Change in accounting period
- 7 State in detail why you need the extension Taxpayer requires additional time to prepare accounting information necessary for completion of tax return.

<b>8a</b> If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	<b>8a</b>	\$ <u>0</u>
<b>b</b> If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868.	<b>8b</b>	\$ <u>0</u>
<b>c</b> <b>Balance due.</b> Subtract line 8b from line 8a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	<b>8c</b>	\$ <u>0</u>

**Signature and Verification must be completed for Part II only.**

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature  Title ☐ Date 10-15-14