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Form

990-PF

Department of the Treasury  
Internal Revenue Service

Return of Private Foundation

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

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Information about Form 990-PF and its instructions is at [www.irs.gov/form990pf](http://www.irs.gov/form990pf).

OMB No 1545-0052

2013

Open to Public Inspection

For calendar year 2013, or tax year beginning 01-01-2013 , and ending 12-31-2013

Name of foundation EDWARD C RAYMUND CHARITABLE FOUNDATION		A Employer identification number 75-2765658	
Number and street (or P O box number if mail is not delivered to street address) 1136 NORTH COTTONWOOD DR		B Telephone number (see instructions) (972) 644-3634	
City or town, state or province, country, and ZIP or foreign postal code RICHARDSON, TX 750803762		C If exemption application is pending, check here <input type="checkbox"/>	
G Check all that apply <div><input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change</div> <div><input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change</div>		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 916,015	J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)	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) (see instructions) )		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)				
	2 Check <input checked="" type="checkbox"/> if the foundation is <b>not</b> required to attach Sch B				
	3 Interest on savings and temporary cash investments	8	8		
	4 Dividends and interest from securities. . . . .	19,126	19,126		
	5a Gross rents . . . . .				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	-4,082			
	b Gross sales price for all assets on line 6a 367,369				
	7 Capital gain net income (from Part IV, line 2) . . .		114		
	8 Net short-term capital gain . . . . .				
	9 Income modifications . . . . .				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold . . . . .				
	c Gross profit or (loss) (attach schedule) . . . . .				
	11 Other income (attach schedule) . . . . .				
	12 <b>Total.</b> Add lines 1 through 11 . . . . .	15,052	19,248		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages . . . . .				
	15 Pension plans, employee benefits . . . . .				
	16a Legal fees (attach schedule) . . . . .				
	b Accounting fees (attach schedule) . . . . .	2,400			
	c Other professional fees (attach schedule) . . . . .	5,105	5,105		
	17 Interest . . . . .				
	18 Taxes (attach schedule) (see instructions)	207	73		
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy . . . . .				
	21 Travel, conferences, and meetings . . . . .				
	22 Printing and publications . . . . .				
	23 Other expenses (attach schedule) . . . . .	710	710		
	24 <b>Total operating and administrative expenses.</b> Add lines 13 through 23 . . . . .	8,422	5,888		0
	25 Contributions, gifts, grants paid . . . . .	47,350			47,350
	26 <b>Total expenses and disbursements.</b> Add lines 24 and 25	55,772	5,888		47,350
	27 Subtract line 26 from line 12				
	a <b>Excess of revenue over expenses and disbursements</b>	-40,720			
	b <b>Net investment income</b> (if negative, enter -0-)		13,360		
	c <b>Adjusted net income</b> (if negative, enter -0-)				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions )	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing . . . . .	10,812	10,358	10,358
	2	Savings and temporary cash investments . . . . .	101,293	66,340	66,340
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable . . . . .			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . .			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use . . . . .			
	9	Prepaid expenses and deferred charges . . . . .			
	10a	Investments—U S and state government obligations (attach schedule)	77,659	54,856	49,982
	b	Investments—corporate stock (attach schedule) . . . . .	268,307	419,772	588,003
	c	Investments—corporate bonds (attach schedule). . . . .	339,171	205,375	201,332
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans . . . . .			
	13	Investments—other (attach schedule) . . . . .			
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15	Other assets (describe ▶ _____)	55			
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	797,297	756,701	916,015	
Liabilities	17	Accounts payable and accrued expenses . . . . .			
	18	Grants payable . . . . .			
	19	Deferred revenue . . . . .			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule) . . . . .			
	22	Other liabilities (describe ▶ _____)		124	
	23	Total liabilities (add lines 17 through 22) . . . . .		124	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted . . . . .	797,297	756,577	
	25	Temporarily restricted . . . . .			
	26	Permanently restricted . . . . .			
	Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds . . . . .			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	Total net assets or fund balances (see page 17 of the instructions) . . . . .	797,297	756,577	
31	Total liabilities and net assets/fund balances (see page 17 of the instructions) . . . . .	797,297	756,701		

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	797,297
2	Enter amount from Part I, line 27a . . . . .	2	-40,720
3	Other increases not included in line 2 (itemize) ▶ _____	3	
4	Add lines 1, 2, and 3 . . . . .	4	756,577
5	Decreases not included in line 2 (itemize) ▶ _____	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	756,577

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						
(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						
b						
c						
d						
e						
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69					(i) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))	
(i) F M V as of 12/31/69		(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any			
a						
b						
c						
d						
e						
2	Capital gain net income or (net capital loss) <div>If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7</div>				2	114
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) <div>If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8</div>				3	

Part V

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No  
If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see page 18 of the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))		
2012	43,742	871,595	0 050186		
2011	58,811	889,311	0 066131		
2010	32,500	910,329	0 035701		
2009	23,553	866,683	0 027176		
2008	60,121	935,366	0 064275		
2 Total of line 1, column (d).				2	0 243469
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years				3	0 048694
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.				4	874,360
5 Multiply line 4 by line 3.				5	42,576
6 Enter 1% of net investment income (1% of Part I, line 27b).				6	134
7 Add lines 5 and 6.				7	42,710
8 Enter qualifying distributions from Part XII, line 4.				8	47,350
If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions					

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)			
1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1		1	134
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 . . . . .			
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	
3 Add lines 1 and 2. . . . .		3	134
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	
5 Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0- . . . . .		5	134
6 Credits/Payments			
a	2013 estimated tax payments and 2012 overpayment credited to 2013	6a	10
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	10
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	124
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid. . . . .		10	
11 Enter the amount of line 10 to be Credited to 2014 estimated tax Refunded		11	

Part VII-A Statements Regarding Activities			
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? . . . . .		1a	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? . . . . .		1b	No
If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.			
c Did the foundation file Form 1120-POL for this year?. . . . .		1c	
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation \$ (2) On foundation managers \$			
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$			
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? . . . . .		2	No
If "Yes," attach a detailed description of the activities.			
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes . . . . .		3	No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?. . . . .		4a	No
b If "Yes," has it filed a tax return on Form 990-T for this year?. . . . .		4b	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? . . . . .		5	No
If "Yes," attach the statement required by General Instruction T.			
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either			
• By language in the governing instrument, or			
• By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument? . . . . .		6	Yes
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.		7	Yes
8a Enter the states to which the foundation reports or with which it is registered (see instructions)			
TX			
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation .		8b	Yes
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)?			
If "Yes," complete Part XIV . . . . .		9	No
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses.		10	No

Part VII-A

Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶NONE	13	Yes	
14	The books are in care of ▶PATRICIA A RAYMUND Telephone no ▶(972) 644-3634 Located at ▶1136 NORTH COTTONWOOD DR RICHARDSON TX ZIP +4 ▶750803762			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of <b>Form 1041</b> —Check here . . . . . ▶ <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year . . . . . ▶	15		
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes", enter the name of the foreign country ▶	16	Yes	No

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? ( <b>Exception.</b> 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 <b>any</b> of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?. . . Organizations relying on a current notice regarding disaster assistance check here. . . . . ▶ <input type="checkbox"/>	1b		
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?. . . . .	1c		
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 ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is <b>not</b> 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 <b>all</b> years listed, answer "No" and attach statement—see instructions ). . . . .	2b		
c	If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?. . . . . <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? ( <i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013.</i> ). . . . .	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?	4b		No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a

During the year did the foundation pay or incur any amount to

(1)

Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

Yes 

No

(2)

Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

Yes 

No

(3)

Provide a grant to an individual for travel, study, or other similar purposes?

Yes 

No

(4)

Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1 ), (2), or (3), or section 4940(d)(2)? (see instructions).

Yes 

No

(5)

Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

Yes 

No

b

If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

5b

Organizations relying on a current notice regarding disaster assistance check here.

c

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

Yes 

No

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

6a

Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

Yes 

No

b

Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

6b

No

If "Yes" to 6b, file Form 8870.

7a

At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

Yes 

No

b

If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

7b

Part VIII

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

1

List all officers, directors, trustees, foundation managers and their compensation (see instructions).

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

2

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

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

Total

number of other employees paid over \$50,000.

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## Part VIII

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

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

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

## Part IX-A Summary of Direct Charitable Activities

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

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
<b>1</b> DIRECT CONTRIBUTIONS TO QUALIFYING ORGANIZATIONS SEE ATTACHED LIST	47,350
<b>2</b>	
<b>3</b>	
<b>4</b>	

**Part IX-B Summary of Program-Related Investments** (see instructions)

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
<b>1</b> N/A	
<b>2</b>	
All other program-related investments See page 24 of the instructions	
<b>3</b>	

**Total.** Add lines 1 through 3 . . . . .



Part X

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities. . . . .	1a	779,916
b	Average of monthly cash balances. . . . .	1b	107,759
c	Fair market value of all other assets (see instructions). . . . .	1c	0
d	Total (add lines 1a, b, and c). . . . .	1d	887,675
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation). . . . .	1e	
2	Acquisition indebtedness applicable to line 1 assets. . . . .	2	
3	Subtract line 2 from line 1d. . . . .	3	887,675
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions). . . . .	4	13,315
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	874,360
6	Minimum investment return. Enter 5% of line 5. . . . .	6	43,718

Part XI

Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6. . . . .	1	43,718
2a	Tax on investment income for 2013 from Part VI, line 5. . . . .	2a	134
b	Income tax for 2013 (This does not include the tax from Part VI ). . . . .	2b	
c	Add lines 2a and 2b. . . . .	2c	134
3	Distributable amount before adjustments Subtract line 2c from line 1. . . . .	3	43,584
4	Recoveries of amounts treated as qualifying distributions. . . . .	4	
5	Add lines 3 and 4. . . . .	5	43,584
6	Deduction from distributable amount (see instructions). . . . .	6	
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1. . . . .	7	43,584

Part XII

Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26. . . . .	1a	47,350
b	Program-related investments—total from Part IX-B. . . . .	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes. . . . .	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required). . . . .	3a	
b	Cash distribution test (attach the required schedule). . . . .	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	47,350
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions). . . . .	5	134
6	Adjusted qualifying distributions. Subtract line 5 from line 4. . . . .	6	47,216
Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years			

Part XIII

Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2012	(c) 2012	(d) 2013
1 Distributable amount for 2013 from Part XI, line 7				43,584
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only. . . . .			43,242	
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2013				
a From 2008. . . . .				
b From 2009. . . . .				
c From 2010. . . . .				
d From 2011. . . . .				
e From 2012. . . . .				
f Total of lines 3a through e. . . . .				
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 47,350				
a Applied to 2012, but not more than line 2a			43,242	
b Applied to undistributed income of prior years (Election required—see instructions). . . . .				
c Treated as distributions out of corpus (Election required—see instructions). . . . .				
d Applied to 2013 distributable amount. . . . .				4,108
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b. . . . .				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed. . . . .				
d Subtract line 6c from line 6b Taxable amount—see instructions . . . . .				
e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount—see instructions . . . . .				
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014 . . . . .				39,476
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions). . . . .				
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions). . .				
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a . . . . .				
10 Analysis of line 9				
a Excess from 2009. . . .				
b Excess from 2010. . . .				
c Excess from 2011. . . .				
d Excess from 2012. . . .				
e Excess from 2013. . . .				

Part XIVPrivate Operating Foundations (see instructions and Part VII-A, question 9)

1a

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

b

Check box to indicate whether the organization is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed.	Tax year	Prior 3 years			(e) Total
		(a) 2013	(b) 2012	(c) 2011	(d) 2010	
b	85% of line 2a					
c	Qualifying distributions from Part XII, line 4 for each year listed.					
d	Amounts included in line 2c not used directly for active conduct of exempt activities.					
e	Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c.					
3	Complete 3a, b, or c for the alternative test relied upon.					
a	"Assets" alternative test—enter					
	(1) Value of all assets.					
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i).					
b	"Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.					
c	"Support" alternative test—enter					
	(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties).					
	(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
	(3) Largest amount of support from an exempt organization.					
	(4) Gross investment income.					

Part XVSupplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see instructions.)

1

Information Regarding Foundation Managers:

a

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

b

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

2

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

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

a

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

PATRICIA A RAYMUND  
1136 NORTH COTTONWOOD DR  
RICHARDSON, TX 75080  
(972) 644-3634

b

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

ALL INFORMATION CONCERNING PAST PERFORMANCE AND PROPOSED USE OF THE REQUESTED CONTRIBUTION, GRANT, GIFT ETC

c

Any submission deadlines

THERE ARE NO SUBMISSIONS DEADLINES

d

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

THERE ARE NO SUCH RESTRICTIONS

Part XV

Supplementary Information (continued)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total . . . . .			3a	47,350
b Approved for future payment				
Total . . . . .			3b	

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2013)

Part XVII

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

1

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?

Yes

No

a

Transfers from the reporting foundation to a noncharitable exempt organization of

1a(1)

No

1a(2)

No

b

Other transactions

1b(1)

No

1b(2)

No

1b(3)

No

1b(4)

No

1b(5)

No

1b(6)

No

c

Sharing of facilities, equipment, mailing lists, other assets, or paid employees.

1c

No

d

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.

(a) Line No	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements

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

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 or fiduciary) is based on all information of which preparer has any knowledge.

\*\*\*\*\*

2014-05-08

\*\*\*\*\*

Signature of officer or trustee

Date

Title

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

Yes


No

Paid Preparer Use Only

Print/Type preparer's name MONICA L CUNNINGHAM CPA	Preparer's Signature	Date 2014-05-08	Check if self-employed <input checked="" type="checkbox"/>	PTIN P00096165
Firm's name	STRAWN MARSHALL CUNNINGHAM CONDON SWEAT		Firm's EIN	
Firm's address	111 SECOND AVE NE SUITE 1600 ST PETERSBURG, FL 33701		Phone no (727) 823-6500	

Form 990-PF (2013)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> Paid during the year				
UNIVERSITY OF SOUTHERN CA UNIVERSITY OF SOUTHERN CALIFORNIA 837 DOWNEY WAY STO-B 837 DOWNEY WAY STO-B LOS ANGELES,CA 90089	NONE	STATE UNIVER	YOUTH EDUCATION	10,000
SJC HISTORICAL SOCIETY SAN JUAN CAPISTRANO HISTORICAL SOCIERTY 31831 LOS RIOS ST 31831 LOS RIOS ST SAN JUAN CAPISTRANO,CA 92675	NONE	NONPROFIT	MUSEUM UPKEEP	1,500
ST MARGARET'S SCHOOL ST MARGARET'S EPISCOPAL SCHOOL 31641 LA NOVIA AVE 31641 LA NOVIA AVE SAN JUAN CAPISTRANO,CA 92675	NONE	EDUCATIONAL	YOUTH EDUCATION	1,700
AMERICAN QUARTER HORSE ASSOC AMERICAN QTR HORSE ASSOC 1600 QUARTER HORSE DR 1600 QUARTER HORSE DR AMARILLO,TX 79104	NONE	501 (C)(3)	SCHOLARSHIPS	1,650
MISSION SJ CAPISTRANO MISSION SJ CAPISTRANO 26801 ORTEGA HWY 26801 ORTEGA HWY SAN JUAN CAPISTRANO,CA 92675	NONE	501 (C)(3)	HISTORICAL PRESERVATION	1,500
UNIVERSITY OF SOUTHERN CA UNIVERSITY OF SOUTHERN CALIFORNIA 837 DOWNEY WAY STO-B 837 DOWNEY WAY STO-B LOS ANGELES,CA 90089	NONE	STATE UNIVER	ATHLETIC FUND	3,000
BAYLOR UNIVERSITY BAYLOR UNIVERSITY ONE BEAR PLACE ONE BEAR PLACE WACO,TX 76798	NONE	EDUCATIONAL	STUDENT CRISIS FUND	50
PACIFIC QUARTERHORSE ASSOCIATION PACIFIC QUARTERHORSE ASSOCIATION 560 WALL ST SUITE A 560 WALL ST SUITE A AUBURN,CA 95603	NONE	501 (C)(3)	ANIMAL APPRECIATION	3,000
BOYS & GIRLS CLUB OF CAPISTRANO VAL BOYS & GIRLS CLUB OF CAPISTRANO VALLEY ONE VIA POSTIVA ONE VIA POSTIVA SAN JUAN CAPISTRANO,CA 92675	NONE	501 (C)(3)	YOUTH MOTIVATION AND EDUCATION	1,000
ACRES OF LOVE ACRES OF LOVE 31920 DEL OBISPO STE 175 31900 DEL OBISPO STE 175 SAN JUAN CAPISTRANO,CA 92675	NONE	501 (C)(3)	CARE FOR ABANDONED CHILDREN	7,200
GIRL SCOUTS OF ORANGE COUNTY GIRL SCOUTS OF ORANGE COUNTY 9500 TOLEDO WAY STE 100 9500 TOLEDO WAY STE 100 IRVINE,CA 92618	NONE	501 (C)(3)	YOUTH DEVELOPMENT	200
MISSION HOSPITAL FOUNDATION MISSION HOSPITAL FOUNDATION 27700 MEDICAL CENTER ROAD 27700 MEDICAL CENTER ROAD MISSION VIEJO,CA 92691	NONE	501 (C)(3)	HEALTHCARE	10,750
UNITED WAY UNITED WAY 18012 MITCHELL WAY SOUTH 18012 MITCHELL WAY SOUTH IRVINE,CA 92614	NONE	501 (C)(3)	MULTIPLE CHARITIES	300
UNIVERSITY OF SOUTHERN CA UNIVERSITY OF SOUTHERN CALIFORNIA 837 DOWNEY WAY STO-B 837 DOWNEY WAY STO-B LOS ANGELES,CA 90089	NONE	STATE UNIVER	BAND	5,000
NAT'L SNAFFLE BIT FOUNDATION NAT'L SNAFFLE BIT FOUNDATION 1391 ST PAUL AVE 1391 ST PAUL AVE GURNEE,IL 60031	NONE	501 (C)(3)	PROMOTE PLEASURE HORSES	500
<b>Total . . . . .</b>  <b>3a</b>				47,350

TY 2013 Accounting Fees Schedule

**Name:** EDWARD C RAYMUND CHARITABLE  
FOUNDATION  
**EIN:** 75-2765658

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FORM 990-PF AND RECORD KEEPING	2,400			



## TY 2013 Compensation Explanation

**Name:** EDWARD C RAYMUND CHARITABLE  
FOUNDATION

**EIN:** 75-2765658

Person Name	Explanation
PATRICIA A RAYMUND	
RUTH HEMING	
ROBERT LUND	
JAMES JENNINGS	
MARY M RAYMUND	

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

TY 2013 Gain/Loss from Sale of Other Assets Schedule

Name:

EDWARD C RAYMUND CHARITABLE  
FOUNDATION

EIN:

75-2765658

Name	Date Acquired	How Acquired	Date Sold	Purchaser Name	Gross Sales Price	Basis	Basis Method	Sales Expenses	Total (net)	Accumulated Depreciation
PUBLICLY TRADED SECURITIES		PURCHASE			367,255	371,451			-4,196	

**TY 2013 Investments Corporate  
Bonds Schedule**

**Name:** EDWARD C RAYMUND CHARITABLE  
FOUNDATION

**EIN:** 75-2765658

<b>Name of Bond</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
BERKSHIRE HATHAWAY FIN		
GENERAL ELECTRIC CO		
GOOGLE INC	25,292	25,102
HESS CORP	52,940	50,373
HEWLETT-PACKARD CO		
ORACLE CORP	26,035	25,464
CATERPILLAR FINANCE	50,815	50,227
WAL-MART STORES		
PEPSIAMERICAS INC	50,293	50,166

TY 2013 Investments Corporate  
Stock Schedule

**Name:** EDWARD C RAYMUND CHARITABLE  
FOUNDATION  
**EIN:** 75-2765658

Name of Stock	End of Year Book Value	End of Year Fair Market Value
ABBOTT LABORATORIES	5,549	5,750
ALLERGAN INC	11,694	13,885
ALTRIA GROUP	3,261	3,839
AMERICAN EXPRESS	8,746	15,878
AMERICAN TOWER CORP	10,887	11,973
AMERICAN WATER WORKS	8,508	11,622
APPLE INC	6,354	19,636
BERKSHIRE HATHAWAY CL B	3,988	5,928
BOEING CO	8,558	17,061
BRISTOL-MYERS SQUIBB	9,563	18,603
CATERPILLAR INC	9,186	13,622
CBL & ASSOC PROPERTIES	10,257	7,633
CEPHEID INC	1,935	2,334
CHURCH & DWIGHT CO	10,249	14,913
COCA-COLA CO	9,938	13,426
COLONIAL PROP TRUST		
COSTCO WHOLESALE	8,471	14,878
CUMMINS INC	5,066	7,049
CVS CAREMARK	6,669	8,946
DEERE & CO	8,932	9,133
DIAGEO PLC	8,610	13,242
ECOLAB INC	10,828	15,641
EDWARDS LIFESCIENCES	7,456	6,576
EMERSON ELECTRIC	4,858	7,018
EQUINIX INC	4,644	4,436
EXXON MOBIL CORP	11,110	12,650
FORD MOTOR COMPANY	7,832	15,430
FREEPORT-MCMORAN	11,853	13,209
GOOGLE INC CL A	11,039	16,811
HAIN CELESTIAL GROUP	10,072	18,156

Name of Stock	End of Year Book Value	End of Year Fair Market Value
HESS CORP	7,028	8,300
HOME DEPOT INC	8,139	12,351
INTL BUSINESS MACHINE	13,260	12,192
KINDER MORGAN INC	11,447	11,700
LOCKHEED MARTIN CORP	6,537	11,150
MCDONALDS CORP	1,770	4,852
MID-AMERICA APARTMENT COMM	2,139	2,187
MONSANTO CO	8,037	14,569
NATIONAL-OILWELL VARCO	10,193	9,941
NESTLE SA	12,336	16,558
NIKE INC		
ORACLE CORP		
PEABODY ENERGY		
PERRIGO CO LTD	19,026	19,183
PERRIGO CO		
PETSMART INC	3,388	3,638
PFIZER INC	9,026	9,189
PRUDENTIAL FINANCIAL	11,337	18,444
QUALCOMM INC	10,899	12,994
SHERWIN WILLIAMS CO	3,760	4,588
UNION PACIFIC CORP	12,873	25,200
VENTAS INC	7,404	5,728
VISA INC CL A	6,499	16,701
WALT DISNEY CO	7,814	13,370
WELLS FARGO & CO	10,747	15,890
WEYERHAEUSER CO		

# TY 2013 Investments Government Obligations Schedule

**Name:** EDWARD C RAYMUND CHARITABLE  
FOUNDATION

**EIN:** 75-2765658

**US Government Securities - End of  
Year Book Value:** 54,856

**US Government Securities - End of  
Year Fair Market Value:** 49,982

**State & Local Government  
Securities - End of Year Book  
Value:**

**State & Local Government  
Securities - End of Year Fair  
Market Value:**

# TY 2013 Other Assets Schedule

**Name:** EDWARD C RAYMUND CHARITABLE  
FOUNDATION

**EIN:** 75-2765658

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
INTEREST PAID AT BOND PURCHASE	45		
PREPAID EXCISE TAX	10		

**TY 2013 Other Expenses Schedule**

**Name:** EDWARD C RAYMUND CHARITABLE  
FOUNDATION

**EIN:** 75-2765658

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXPENSES				
REGISTERED AGENT FEE	387	387		
BANK CHARGES	37	37		
CHECK PRINTING	286	286		



## TY 2013 Other Liabilities Schedule

**Name:** EDWARD C RAYMUND CHARITABLE  
FOUNDATION

**EIN:** 75-2765658

Description	Beginning of Year - Book Value	End of Year - Book Value
FEDERAL EXCISE TAX PAYABLE		124

TY 2013 Other Professional Fees Schedule

**Name:** EDWARD C RAYMUND CHARITABLE  
FOUNDATION  
**EIN:** 75-2765658

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT FEES	5,105	5,105		






**TY 2013 Taxes Schedule**

**Name:** EDWARD C RAYMUND CHARITABLE  
FOUNDATION

**EIN:** 75-2765658

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAX WITHHELD- DIVIDENDS	73	73		
FEDERAL EXCISE TAX	134			

Form 990PF Part VIII Line 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
PATRICIA A RAYMUND 	PRESIDENT/DI 4 00	0	0	0
1136 NORTH COTTONWOOD DR RICHARDSON,TX 750803762				
RUTH HEMING 	DIRECTOR 1 00	0	0	0
411 TICO ROAD OJAI,CA 93023				
ROBERT LUND 	DIRECTOR 1 00	0	0	0
32462 SPYGLASS COURT SAN JUAN CAPISTRANO,CA 92675				
JAMES JENNINGS 	DIRECTOR 4 00	0	0	0
9 LADBROOK GROVE COTA DE CAZA,CA 92679				
MARY M RAYMUND 	DIRECTOR 4 00	0	0	0
1136 NORTH COTTONWOOD DR RICHARDSON,TX 750803762				