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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

▶ Do not enter Social Security numbers on this form as it may be made public. By law, the IRS cannot redact the information on the form.

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

OMB No 1545-0052

2013

Open to Public Inspection

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

Name of foundation THE MYRON STRATTON HOME		A Employer identification number 84-0404260	
% THE MYRON STRATTON HOME		B Telephone number (see instructions) (719) 579-0930	
Number and street (or P O box number if mail is not delivered to street address) 555 GOLD PASS HEIGHTS Suite		C If exemption application is pending, check here ▶ ☐	
Room/suite			
City or town, state or province, country, and ZIP or foreign postal code COLORADO SPRINGS, CO 80906		D 1. Foreign organizations, check here ▶ ☐	
G Check all that apply ☐ Initial return ☐ Initial return of a former public charity		2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐	
☐ Final return ☐ Amended return		E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐	
☐ Address change ☐ Name change		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation			
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation			
I Fair market value of all assets at end of year (<i>from Part II, col. (c), line 16</i>)▶\$ 174,680,376		J Accounting method ☐ Cash ☒ Accrual ☐ Other (specify) _____ (<i>Part I, column (d) must be on cash basis.</i>)	

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)	155			
	2 Check ▶ ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	3,140	3,140	3,140	
	4 Dividends and interest from securities.	1,710,229	1,710,229	1,710,229	
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	2,649,443			
	b Gross sales price for all assets on line 6a 12,165,513				
	7 Capital gain net income (from Part IV, line 2) . . .		2,649,443		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	4,525,805	3,514,088	4,525,805	
	12 Total. Add lines 1 through 11	8,888,772	7,876,900	6,239,174	
	13 Compensation of officers, directors, trustees, etc	240,075	30,004	240,075	210,071
	14 Other employee salaries and wages	1,435,147	7,176	1,435,147	1,427,971
	15 Pension plans, employee benefits	1,207,197	6,037	1,207,197	1,201,160
	16a Legal fees (attach schedule)	7,518	0	7,518	7,518
	b Accounting fees (attach schedule)	18,422	9,211	18,422	9,211
	c Other professional fees (attach schedule)	357,126	325,479	357,126	31,647
	17 Interest				
	18 Taxes (attach schedule) (see instructions)				
	19 Depreciation (attach schedule) and depletion . . .	646,035		646,035	
	20 Occupancy				
	21 Travel, conferences, and meetings	25,177		25,177	25,177
	22 Printing and publications				
	23 Other expenses (attach schedule)	1,262,094		1,262,094	1,262,094
	24 Total operating and administrative expenses. Add lines 13 through 23	5,198,791	377,907	5,198,791	4,174,849
	25 Contributions, gifts, grants paid	275,500			315,500
	26 Total expenses and disbursements. Add lines 24 and 25	5,474,291	377,907	5,198,791	4,490,349
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	3,414,481			
	b Net investment income (if negative, enter -0-)		7,498,993		
	c Adjusted net income (if negative, enter -0-)			1,040,383	

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	2,000	2,907	2,907
	2	Savings and temporary cash investments	7,157,122	1,114,418	1,114,418
	3	Accounts receivable ▶ <u>45,545</u>			
		Less allowance for doubtful accounts ▶ _____	35,705	45,545	45,545
	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	24,489	24,436	24,436
	9	Prepaid expenses and deferred charges	38,191	82,441	82,441
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	58,560,027	76,398,299	76,398,299
	c	Investments—corporate bonds (attach schedule).	7,993,611	7,849,292	7,849,292
	11	Investments—land, buildings, and equipment basis ▶ _____			
Liabilities		Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	50,688,183	59,222,598	59,222,598
	14	Land, buildings, and equipment basis ▶ <u>31,743,557</u>			
		Less accumulated depreciation (attach schedule) ▶ <u>11,376,634</u>	18,296,081	20,366,923	29,294,823
	15	Other assets (describe ▶ _____)	1,185,940	645,617	645,617
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	143,981,349	165,752,476	174,680,376
	17	Accounts payable and accrued expenses	1,832,928	1,211,998	
	18	Grants payable	40,000		
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)	1,872,928	1,211,998	
Net Assets or Fund Balances		Foundations that follow SFAS 117, check here ▶ ☒ and complete lines 24 through 26 and lines 30 and 31.			
	24	Unrestricted	138,336,400	160,662,841	
	25	Temporarily restricted			
	26	Permanently restricted	3,772,021	3,877,637	
		Foundations that do not follow SFAS 117, check here ▶ ☐ 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)	142,108,421	164,540,478	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	143,981,349	165,752,476	

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	142,108,421
2	Enter amount from Part I, line 27a	2	3,414,481
3	Other increases not included in line 2 (itemize) ▶ _____	3	19,017,576
4	Add lines 1, 2, and 3	4	164,540,478
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	164,540,478

Part IV

Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1 a	LT CAP GAIN ON SALE OF INVESTMENTS	P		
b				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 12,165,513		9,516,070	2,649,443
b			
c			
d			
e			

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

(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a			2,649,443
b			
c			
d			
e			

2	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	2,649,443
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8		3	

Part V

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

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

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

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2012			
2011			
2010			
2009			
2008			

2	Total of line 1, column (d).	2	
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	
4	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.	4	
5	Multiply line 4 by line 3.	5	
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	
7	Add lines 5 and 6.	7	
8	Enter qualifying distributions from Part XII, line 4. If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions	8	

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)

1a Exempt operating foundations described in section 4940(d)(2), check here ☒ and enter "N/A" on line 1		1	N/A		
Date of ruling or determination letter <u>1986-03-17</u> (attach copy of letter if necessary—see instructions)					
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b		2			
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-)				3	0
3 Add lines 1 and 2.				4	
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		5	0		
5 Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		6			
6 Credits/Payments					
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a				
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	0		
8 Enter any penalty for underpayment of estimated tax Check here ☐ if Form 2220 is attached		8			
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	0		
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?		Yes	No
		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)? <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.</i>	1b		No
		1c		No
c	Did the foundation file Form 1120-POL for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation \$ (2) On foundation managers \$			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV.</i>	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) CO			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation .</i>	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>	9	Yes	
10	Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>	10		No

Part VII-A

Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► WWW.MYRONSTRATTON.ORG	13	Yes	
14	The books are in care of ► THE MYRON STRATTON HOME Telephone no ► (719) 579-0930 Located at ► 555 GOLD HEIGHTS PASS, COLORADO SPRINGS, CO ZIP +4 ► 80906			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here ► ☐ and enter the amount of tax-exempt interest received or accrued during the year ► 15			
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See 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? ☐ Yes ☒ No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☒ Yes ☐ No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? . . . Organizations relying on a current notice regarding disaster assistance check here. ► ☐	1b		No
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? ☐ Yes ☒ No If "Yes," list the years ► 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions).	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ► 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2013 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013.</i>)	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?	4b		No

Part VII-B

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

5a	During the year did the foundation pay or incur any amount to			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	☐ Yes ☒ No		
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	☐ Yes ☒ No		
	(3) Provide a grant to an individual for travel, study, or other similar purposes?	☐ Yes ☒ No		
	(4) Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions).	☐ Yes ☒ No		
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	☐ Yes ☒ No		
b	If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?		5b	
	Organizations relying on a current notice regarding disaster assistance check here.	☒		
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?	☐ Yes ☐ No		
	If "Yes," attach the statement required by Regulations section 53.4945–5(d).			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	☐ Yes ☒ No		
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		6b	No
	If "Yes" to 6b, file Form 8870.			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	☐ Yes ☒ No		
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?		7b	

Part VIII

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

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).				
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
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
CANDICE K HARVEY	BUSINESS MANAGER	75,705	25,440	
555 GOLD PASS HEIGHTS	40 0			
COLORADO SPRINGS,CO 80906				
LINDA SANDEN	SENIOR SVCS	83,660	18,172	
555 GOLD PASS HEIGHTS	DIRECTOR			
COLORADO SPRINGS,CO 80906	40 0			
MARGARET HUNTER	NURSING	65,141	31,020	
555 GOLD PASS HEIGHTS	SUPERVISOR			
COLORADO SPRINGS,CO 80906	40 0			
RICK WHITE	MAINTENANCE	71,593	9,051	
555 GOLD PASS HEIGHTS	SUPRVSR			
COLORADO SPRINGS,CO 80906	40 0			
Total number of other employees paid over \$50,000.				

Part VIII

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

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
WELLS FARGO INSURANCE SERVICES 5755 MARK DABBLING BLVD 300 COLORADO SPRINGS,CO 80919	GENERAL INSURANCE	131,798
MERITAIN HEALTH 9605 S KINGSTON CT ENGLEWOOD,CO 80112		
VLADIMIR JONES 6 N TEJON STREET FLOOR 4 COLORADO SPRINGS,CO 80903	INSURANCE PREMIUMS	170,654
	PUBLIC RELATIONS	150,566
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	Expenses
1ADULT SERVICES THE HOME PROVIDES RESIDENTIAL SERVICES TO ELDERLY PERSONS THE AVERAGE NUMBER OF ADULTS SERVED ON A DAILY BASIS WAS 86	3,380,333
2STRATTON CONSORTIUM PROVIDES SERVICES TO SINGLE MOTHERS INCLUDES MYRON STRATTON HOME, PEAK VISTA COMM CTRS, TESSA, EARLY CONNECTIONS AND PARTNERS IN HOUSING, ALL 501 (C)3 ORGS	35,637
3	
4	

Part IX-B Summary of Program-Related Investments (see instructions)	
Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments See page 24 of the instructions	
3	
Total. Add lines 1 through 3	

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	133,298,512
b	Average of monthly cash balances.	1b	235,829
c	Fair market value of all other assets (see instructions).	1c	13,890,559
d	Total (add lines 1a, b, and c).	1d	147,424,900
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	0
3	Subtract line 2 from line 1d.	3	147,424,900
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	2,211,374
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	145,213,526
6	Minimum investment return. Enter 5% of line 5.	6	7,260,676

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	
2a	Tax on investment income for 2013 from Part VI, line 5.	2a	
b	Income tax for 2013 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	
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	

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	4,490,349
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	2,716,877
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	0
b	Cash distribution test (attach the required schedule).	3b	0
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	7,207,226
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	
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	7,207,226
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			
2	Undistributed income, if any, as of the end of 2013			
a	Enter amount for 2012 only.			
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 ▶ \$ _____			
a	Applied to 2012, but not more than line 2a			
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.			
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			
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 XIV

Private 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.

1991-07-02

b

Check box to indicate whether the organization is a private operating foundation described in section 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	
		0	0	0		0
b	85% of line 2a	0	0	0		0
c	Qualifying distributions from Part XII, line 4 for each year listed	7,207,226	8,473,618	4,416,874	5,025,462	25,123,180
d	Amounts included in line 2c not used directly for active conduct of exempt activities	275,500	295,000	315,500	290,000	1,176,000
e	Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c	6,931,726	8,178,618	4,101,374	4,735,462	23,947,180
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)						
						0
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . . .						
		4,840,450	3,987,831	3,717,497	3,351,080	15,896,858
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)						
						0
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).						
						0
(3) Largest amount of support from an exempt organization						
						0
(4) Gross investment income						
						0

Part XV

Supplementary 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

MARK TURK
555 GOLD PASS HEIGHTS
COLORADO SPRINGS, CO 80906
(719) 579-0930

b

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

HOME NO PRESCRIBED FORMS GRANTS CONTACT MARK TURK AT 719-579-0930

c

Any submission deadlines

HOME NONE GRANTS MAY 1 AND NOVEMBER 1

d

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

HOME APPLICANTS MUST HAVE DEMONSTRATED NEED

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	315,500
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)

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
MARK TURK	EXECUTIVE DIRECTOR 40 0	168,075	72,628	0
555 GOLD PASS HEIGHTS COLORADO SPRINGS, CO 80906				
ROBERT G BAKER JR	PRESIDENT 1 0	24,000	0	0
5904 VIA VERONA VIEW COLORADO SPRINGS, CO 80919				
JON MEDVED	VICE PRESIDENT 1 0	12,000	0	0
1785 CANTWELL GROVE COLORADO SPRINGS, CO 80906				
NECHIE HALL	SECRETARY/TREASURER 1 0	12,000	0	0
100 GARDNER PLACE COLORADO SPRINGS, CO 80906				
LEONARD A FARR	TRUSTEE 0	12,000	0	0
4890 BROAD LAKE VIEW COLORADO SPRINGS, CO 80906				
C DAVID MCDERMOTT	TRUSTEE 0	12,000	0	0
660 SOUTHPOINTE CT COLORADO SPRINGS, CO 80906				

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
HOMEWARD PIKES PEAK 518 N NEVADA AVE COLORADO SPRINGS, CO 80903	NONE	PC	PROGRAM SUPPORT HOMELESS OUTREACH PROGRAM	10,000
TLC PHARMACY 555 EAST COSTILLA COLORADO SPRINGS, CO 80903	NONE	PC	PROGRAM SUPPORT TLC PHARMACY CONNECTION - PROVIDING MEDICATION ACCESS FOR THE POOR AND UNINSURED	7,500
PENROSE ST FRANCIS HEALTH FOUNDATION 2222 N NEVADA AVENUE COLORADO SPRINGS, CO 80907	NONE	PC	PROGRAM SUPPORT PENROSE URGENT CARE - CARING FOR THE UN- AND UNDERINSURED	7,500
GRECCIO HOUSING 1808 WEST COLORADO AVENUE COLORADO SPRINGS, CO 80904	NONE	PC	PROGRAM SUPPORT RESIDENT ENRICHMENT PROGRAM	15,000
ATLAS PREPARATORY 1602 S MURRAY BLVD COLORADO SPRINGS, CO 80916	NONE	PC	PROGRAM SUPPORT AFTER SCHOOL TUTORING INITIATIVES	15,000
CATHOLIC CHARITIES OF CENTRAL CO 228 N CASCADE AVENUE COLORADO SPRINGS, CO 80903	NONE	PC	PROGRAM SUPPORT POVERTY REDUCTION PROGRAMS	7,500
CS CONSERVATORY 415 SAHWATCH COLORADO SPRINGS, CO 80903	NONE	PC	PROGRAM SUPPORT SCHOLARSHIPS PROGRAM	10,000
CS THERAPEUTIC RIDING CENTER 3254 PASEO ROAD COLORADO SPRINGS, CO 80909	NONE	PC	PROGRAM SUPPORT SCHOLARSHIPS PROGRAMS	5,000
MERCY'S GATE PO BOX 26416 COLORADO SPRINGS, CO 80918	NONE	PC	PROGRAM SUPPORT RENTAL ASSISTANCE PROGRAM	7,500
MISSION MEDICAL CLINIC 2125 E LASALLE COLORADO SPRINGS, CO 80909	NONE	PC	PROGRAM SUPPORT GENERAL PROGRAM SUPPORT	12,000
PIKES PEAK COMMUNITY ACTION AGENCY PO BOX 2468 COLORADO SPRINGS, CO 80906	NONE	PC	PROGRAM SUPPORT GENERAL PROGRAM SUPPORT	10,000
SAFE PASSAGE 423 SOUTH CASCADE AVENUE COLORADO SPRINGS, CO 80903	NONE	PC	PROGRAM SUPPORT FILL THE GAP PROJECT	5,000
SPRINGS RESCUE MISSION 5 WEST LAS VEGAS STREET COLORADO SPRINGS, CO 80918	NONE	PC	PROGRAM SUPPORT FAMILY CRISIS CENTER	10,000
TELLER SENIOR COALITION PO BOX 6956 WOODLAND PARK, CO 80866	NONE	PC	PROGRAM SUPPORT GOLDEN CIRCLE NUTRITION PROGRAM	5,000
TESSA 435 GOLD PASS HEIGHTS COLORADO SPRINGS, CO 80906	NONE	PC	PROGRAM SUPPORT GENERAL PROGRAM SUPPORT	20,000
Total  3a				315,500

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
TRI-COUNTY FAMILY CARE CENTER 512 1/2 NORTH MAIN STREET ROCKY FORD,CO 81067	NONE	PC	PROGRAM SUPPORT NEWBORN VISITATION AND PARENTS AS TEACHERS PROGRAMS	5,000
UNIVERSITY OF COLORADO FOUNDATION 1420 AUSTIN BLUFFS PARKWAY COLORADO SPRINGS,CO 80918	NONE	PC	PROGRAM SUPPORT KAREN POSSEHL WOMEN'S ENDOWMENT	5,000
URBAN PEAK COLORADO SPRINGS 423 EAST CUCHARRAS STREET COLORADO SPRINGS,CO 80903	NONE	PC	PROGRAM SUPPORT RUN AWAY AND HOMELESS YOUTH SERVICES	10,000
WESTSIDE CARES 1930 WEST COLORADO AVENUE COLORADO SPRINGS,CO 80904	NONE	PC	PROGRAM SUPPORT CRITICAL SERVICES AID	5,500
CASA OF THE PIKES PEAK REGION 701 SOUTH CASCADE AVENUE COLORADO SPRINGS,CO 80903	NONE	PC	PROGRAM SUPPORT DEPENDENCY AND NEGLECT PROGRAM & PEER COORDINATOR PROGRAMS	25,000
STARLIGHT CHILDREN'S FOUNDATION 17315 CARIBOU DRIVE EAST MONUMENT,CO 80132	NONE	PC	PROGRAM SUPPORT GENERAL OPERATING EXPENSES	5,000
TRI LAKES CARES PO BOX 1301 MONUMENT,CO 80132	NONE	PC	PROGRAM SUPPORT GENERAL OPERATING EXPENSES	9,000
BOYS & GIRLS CLUB PO BOX 2078 COLORADO SPRINGS,CO 80901	NONE	PC	PROGRAM SUPPORT YOUTH DEVELOPMENT PROGRAMS	10,000
SUICIDE PREVENTION PARTERSHIP 704 NORTH TEJON STREET COLORADO SPRINGS,CO 80903	NONE	PC	PROGRAM SUPPORT CHILDREN'S BEREAVEMENT GROUPS	9,000
COLORADO SPRINGS TEEN COURT PO BOX 2169 COLORADO SPRINGS,CO 80901	NONE	PC	PROGRAM SUPPORT RESTORATIVE JUSTICE SENTENCING PROGRAM	5,000
HOMEFRONT CARES PO BOX 38516 COLORADO SPRINGS,CO 80937	NONE	PC	PROGRAM SUPPORT GRANTS TO FAMILIES PROGRAM	15,000
INTERFAITH HOSPITALITY NETWORK 519 NORTH TEJON STREET COLORADO SPRINGS,CO 80903	NONE	PC	PROGRAM SUPPORT SHELTER PROGRAM	10,000
CU AGING CENTER 1436 N HANCOCK AVENUE COLORADO SPRINGS,CO 80903	NONE	PC	PROGRAM SUPPORT PSYCHOLOGICAL SERVICES@ PP HOSPICE & PALLIATIVE CARE	20,000
THE RESOURCE EXCHANGE 418 SOUTH WEBER STREET COLORADO SPRINGS,CO 80903	NONE	PC	PROGRAM SUPPORT EARLY INTERVENTION PROGRAM	10,000
ENERGY RESOURCE CENTER 5920 PAONIA COURT COLORADO SPRINGS,CO 80915	NONE	PC	PROGRAM SUPPORT EMERGENCY FURNACE REPAIR AND ENERGY EFFICIENT UPGRADES	15,000
Total  3a				315,500

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
COURT CARE FOR PIKES PEAK REGION PO BOX 68 COLORADO SPRINGS, CO 80901	NONE	PC	PROGRAM SUPPORT CHILD CARE SERVICES	10,000
Total  3a				315,500

TY 2013 Accounting Fees Schedule

Name: THE MYRON STRATTON HOME

EIN: 84-0404260

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	18,422	9,211	18,422	9,211

TY 2013 Contractor Compensation Explanation

Name: THE MYRON STRATTON HOME

EIN: 84-0404260

Contractor	Explanation
VLADIMIR JONES	PUBLIC RELATIONS/EVENT COORDINATION

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

TY 2013 Depreciation Schedule

Name: THE MYRON STRATTON HOME

EIN: 84-0404260

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
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**TY 2013 Investments Corporate
Bonds Schedule**

Name: THE MYRON STRATTON HOME
EIN: 84-0404260

Name of Bond	End of Year Book Value	End of Year Fair Market Value
BOND MUTUAL FUNDS	7,849,292	7,849,292

**TY 2013 Investments Corporate
Stock Schedule****Name:** THE MYRON STRATTON HOME**EIN:** 84-0404260

Name of Stock	End of Year Book Value	End of Year Fair Market Value
CORPORATE STOCK	42,091,153	42,091,153
EQUITY MUTUAL FUNDS	34,307,146	34,307,146

TY 2013 Investments - Land Schedule**Name:** THE MYRON STRATTON HOME**EIN:** 84-0404260

TY 2013 Investments - Other Schedule

Name: THE MYRON STRATTON HOME

EIN: 84-0404260

Category / Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
OIL & GAS ROYALTIES		35,660	35,660
ALTERNATIVE INVESTMENTS		59,186,938	59,186,938

TY 2013 Land, Etc. Schedule**Name:** THE MYRON STRATTON HOME**EIN:** 84-0404260

TY 2013 Legal Fees Schedule

Name: THE MYRON STRATTON HOME

EIN: 84-0404260

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	7,518		7,518	7,518

TY 2013 Other Assets Schedule**Name:** THE MYRON STRATTON HOME**EIN:** 84-0404260

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
INTEREST & DIVIDEND RECEIVABLE	77,558	85,915	85,915
ACCRUED ROYALTIES RECEIVABLE	1,108,382	559,702	559,702

TY 2013 Other Expenses Schedule

Name: THE MYRON STRATTON HOME

EIN: 84-0404260

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
WORKERS COMP	44,933		44,933	44,933
EMPLOYEE RELATIONS	2,035		2,035	2,035
INSURANCE	134,383		134,383	134,383
DUES & SUBSCRIPTIONS	6,967		6,967	6,967
OFFICE EXPENSE	29,098		29,098	29,098
TELEPHONE	12,748		12,748	12,748
HOUSEKEEPING	60,593		60,593	60,593
MARKETING	169,427		169,427	169,427
UTILITIES	328,134		328,134	328,134
REPAIRS & MAINTENANCE	155,981		155,981	155,981
RECREATION	12,328		12,328	12,328
EDEN ALTERNATIVE	2,128		2,128	2,128
DIETARY	157,841		157,841	157,841
CONTRACT SERVICES	142,321		142,321	142,321
CONTRIBUTIONS	337		337	337
MISCELLANEOUS	2,840		2,840	2,840

TY 2013 Other Income Schedule**Name:** THE MYRON STRATTON HOME**EIN:** 84-0404260

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
ROYALTY FEES	3,504,625	3,504,625	3,504,625
STOCK LITIGATION SETTLEMENT	9,463	9,463	9,463
HOME OPERATING REVENUES	800,398		800,398
UTILITY REIMBURSEMENT	98,736		98,736
OTHER REIMBURSEMENT	112,583		112,583

TY 2013 Other Increases Schedule

Name: THE MYRON STRATTON HOME

EIN: 84-0404260

Description	Amount
UNREALIZED GAIN	19,017,576

TY 2013 Other Professional Fees Schedule**Name:** THE MYRON STRATTON HOME**EIN:** 84-0404260

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT FEES	325,479	325,479	325,479	
CONSULTING FEES	31,647		31,647	31,647