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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.

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 SUSAN AND FORD SCHUMANN FOUNDATION C/O HENRY & HORNE LLP		A Employer identification number 86-0553890	
Number and street (or P O box number if mail is not delivered to street address) 7098 E COCHISE ROAD NO 100		Room/suite	
City or town, state or province, country, and ZIP or foreign postal code SCOTTSDALE, AZ 85253		B Telephone number (see instructions) (480) 483-1170	
G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		C If exemption application is pending, check here ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ☐ \$ 3,663,531		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
J Accounting method ☒ Cash ☐ Accrual ☐ 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 ☐	

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)	269			
	2 Check ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities.	72,725	72,725		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	139,949			
	b Gross sales price for all assets on line 6a 254,124				
	7 Capital gain net income (from Part IV, line 2) . . .		139,949		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
Operating and Administrative Expenses	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	212,943	212,674		
	13 Compensation of officers, directors, trustees, etc	0	0		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)	926	741		185
	b Accounting fees (attach schedule)	7,041	5,633		1,408
	c Other professional fees (attach schedule)	9,588	9,588		0
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	2,215	672		0
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	76	76		0
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	19,846	16,710		1,593
	25 Contributions, gifts, grants paid	108,374			108,374
	26 Total expenses and disbursements. Add lines 24 and 25	128,220	16,710		109,967
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	84,723			
	b Net investment income (if negative, enter -0-)		195,964		
	c Adjusted net income (if negative, enter -0-)				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	1,320	8,629	8,629
	2	Savings and temporary cash investments	75,071	100,004	100,004
	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)			
	b	Investments—corporate stock (attach schedule)	2,736,465	2,788,946	3,554,898
	c	Investments—corporate bonds (attach schedule).			
	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 ▶ _____)			
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	2,812,856	2,897,579	3,663,531
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)	0	0	
Net Assets or Fund Balances		Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds	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	2,812,856	2,897,579	
	30	Total net assets or fund balances (see page 17 of the instructions)	2,812,856	2,897,579	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	2,812,856	2,897,579	

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	2,812,856
2	Enter amount from Part I, line 27a	2	84,723
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	2,897,579
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	2,897,579

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	See Additional Data Table			
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 See Additional Data Table			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) 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 See Additional Data Table			
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	139,949
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	136,240	2,916,777	0 046709
2011	141,259	2,909,446	0 048552
2010	159,348	2,737,335	0 058213
2009	173,821	2,508,344	0 069297
2008	140,671	3,267,257	0 043055

2	Total of line 1, column (d).	2	0 265826
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 053165
4	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.	4	3,277,606
5	Multiply line 4 by line 3.	5	174,254
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	1,960
7	Add lines 5 and 6.	7	176,214
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	109,967

Part VIExcise 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		
	Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b	1	3,919
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0
3	Add lines 1 and 2.	3	3,919
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	3,919
6	Credits/Payments		
a	2013 estimated tax payments and 2012 overpayment credited to 2013	6a	1,600
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d.	7	1,600
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	2,319
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-AStatements 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	Yes	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
	<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>			
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): ☐ AZ _____			
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		No
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?	13	Yes	
Website address ▶NA				
14	The books are in care of ▶HENRY HORNE LLP Telephone no ▶(480) 483-1170 Located at ▶7098 E COCHISE ROAD SUITE 100 SCOTTSDALE AZ ZIP +4 ▶85253			
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?	16	Yes	No
See instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes", enter the name of the foreign country ▶				

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		
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))?

YesNo

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

YesNo

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

YesNo

(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).

YesNo

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

YesNo

5b

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)?

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?

YesNo

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?

YesNo

6b

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

No

7a

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

YesNo

7b

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

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.

0

Part VIII

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

3 Five highest-paid independent contractors for professional services (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.		0

Part IX-A

Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1	
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See page 24 of the instructions.	
3	
Total. Add lines 1 through 3.	0

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	3,298,538
b	Average of monthly cash balances.	1b	28,981
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	3,327,519
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	3,327,519
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	49,913
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	3,277,606
6	Minimum investment return. Enter 5% of line 5.	6	163,880

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	163,880
2a	Tax on investment income for 2013 from Part VI, line 5.	2a	3,919
b	Income tax for 2013 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	3,919
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	159,961
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	159,961
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	159,961

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	109,967
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	
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	109,967
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	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	109,967
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				159,961
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2013				
a From 2008.				
b From 2009.				
c From 2010. 8,436				
d From 2011.				
e From 2012.				
f Total of lines 3a through e.	8,436			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 109,967				
a Applied to 2012, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2013 distributable amount.				109,967
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a).)	8,436			8,436
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0			
b Prior years' undistributed income Subtract line 4b from line 2b.		0		
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.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014				41,558
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions).	0			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions). . . .	0			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	0			
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

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)

	Tax year	Prior 3 years			(e) Total
	(a) 2013	(b) 2012	(c) 2011	(d) 2010	
2a 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					

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 of the person to whom applications should be addressed

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

c Any submission deadlines

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

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	108,374
b Approved for future payment				
Total			3b	0

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?

a

Transfers from the reporting foundation to a noncharitable exempt organization of

1

Cash.

1a(1)

No

2

Other assets.

1a(2)

No

b

Other transactions

1

Sales of assets to a noncharitable exempt organization.

1b(1)

No

2

Purchases of assets from a noncharitable exempt organization.

1b(2)

No

3

Rental of facilities, equipment, or other assets.

1b(3)

No

4

Reimbursement arrangements.

1b(4)

No

5

Loans or loan guarantees.

1b(5)

No

6

Performance of services or membership or fundraising solicitations.

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.

Signature of officer or trustee

2014-03-18

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 CANDACE BERG TOOKE CPA	Preparer's Signature	Date 2014-03-18	Check if self-employed ☐	PTIN P00038193	
Firm's name	HENRY & HORNE LLP			Firm's EIN	86-0133881
Firm's address	7098 E COCHISE SUITE 100 SCOTTSDALE, AZ 852534517			Phone no.	(480) 483-1170

Form 990-PF (2013)

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
CAPITAL INCOME BUILDER 41 3197SHS	P	2005-06-29	2013-01-18
CAPITAL INCOME BUILDER 42 8564SHS	P	2005-06-29	2013-04-18
CAPITAL INCOME BUILDER 248 6679SHS	P	2005-06-29	2013-04-23
CAPITAL INCOME BUILDER 43 1712SHS	P	2005-06-29	2013-07-18
CAPITAL INCOME BUILDER 43 3599SHS	P	2005-06-29	2013-10-17
GROWTH FUND OF AMERICA 961 5385SHS	P	2005-06-29	2013-04-23
GROWTH FUND OF AMERICA 2328 2887SHS	P	2005-06-29	2013-12-31
CAPITAL GAINS DIVIDENDS	P		

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
2,221		2,175	46
2,373		2,255	118
14,000		13,087	913
2,426		2,272	154
2,501		2,282	219
36,000		26,920	9,080
100,000		65,184	34,816
94,603			94,603

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) 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	
			46
			118
			913
			154
			219
			9,080
			34,816
			94,603

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
W FORD SCHUMANN	PRESIDENT 5 00	0	0	0
7098 E COCHISE ROAD 100 SCOTTSDALE,AZ 85253				
SUSAN H SCHUMANN	SECRETARY 1 00	0	0	0
7098 E COCHISE ROAD 100 SCOTTSDALE,AZ 85253				
CANDACE TOOKE	TREASURER 0 50	0	0	0
7098 E COCHISE ROAD 100 SCOTTSDALE,AZ 85253				
JOHN JAY SCHUMANN	DIRECTOR 0 00	0	0	0
7098 E COCHISE ROAD 100 SCOTTSDALE,AZ 85253				
KRISTY SUSAN FOSTER	DIRECTOR 0 00	0	0	0
7098 E COCHISE ROAD 100 SCOTTSDALE,AZ 85253				

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				
350ORG 1 SAINT MATTHEWS CT WASHINGTON DC,DC 20036	NONE	501 (C) (3)	CHARITABLE PURPOSE	5,000
AAIA (ASSOCIATION ON AMERICAN INDIAN AFFAIRS) 966 HUNERFORD DRIVE SUITE 12B ROCKVILLE,MD 20850	NONE	501 (C) (3)	CHARITABLE PURPOSE	1,000
AARP FOUNDATION 601 E STREET NW WASHINGTON DC,DC 20049	NONE	501 (C) (3)	CHARITABLE PURPOSE	250
AARP FOUNDATION 601 E STREET NW WASHINGTON DC,DC 20049	NONE	501 (C) (3)	CHARITABLE PURPOSE	250
ACLU FOUNDATION 125 BROAD STREET NEWYORK,NY 10004	NONE	501 (C) (3)	CHARITABLE PURPOSE	3,000
ACTORS FUND 729 SEVENTH AVENUE 10TH FLOOR NEWYORK,NY 10019	NONE	501 (C) (3)	CHARITABLE PURPOSE	250
AFRICAN WILDLIFE FOUNDATION 1400 SIXTEENTH STREET NW STE 120 WASHINGTON DC,DC 20036	NONE	501 (C) (3)	CHARITABLE PURPOSE	500
ALZHEIMERS ASSOCIATION 1028 E MCDOWELL ROAD PHOENIX,AZ 85006	NONE	501 (C) (3)	CHARITABLE PURPOSE	250
AMERICAN CANCER SOCIETY 2120 1ST AVENUE NORTH SEATTLE,WA 98109	NONE	501 (C) (3)	CHARITABLE PURPOSE	500
AMERICAN FOUNDATION FOR THE BLIND 2 PENN PLAZA SUITE 1102 NEWYORK,NY 10001	NONE	501 (C) (3)	CHARITABLE PURPOSE	100
AMERICAN HEART ASSOCIATION 7272 GREENVILLE AVE DALLAS,TX 75231	NONE	501 (C) (3)	CHARITABLE PURPOSE	100
AMERICAN INDIAN COLLEGE FUND 8333 GREENWOOD BLVD DENVER,CO 80221	NONE	501 (C) (3)	CHARITABLE PURPOSE	500
AMERICAN LUNG ASSOCIATION 102 W MCDOWELL ROAD PHOENIX,AZ 85003	NONE	501 (C) (3)	CHARITABLE PURPOSE	100
AMERICAN PRESS INC 106 WEST 56TH STREET NEWYORK,NY 10019	NONE	501 (C) (3)	CHARITABLE PURPOSE	244
AMFAR 120 WALL STREET 13TH FLOOR NEWYORK,NY 10005	NONE	501 (C) (3)	CHARITABLE PURPOSE	500
Total  3a				108,374

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>				
AMNESTY INTERNATIONAL 5 PENN PLAZA NEW YORK, NY 10001	NONE	501 (C) (3)	CHARITABLE PURPOSE	750
ANDERSON RANCH ARTS CENTER 5263 OWL CREEK ROAD SNOWMASS VILLAGE, CO 81615	NONE	501 (C) (3)	CHARITABLE PURPOSE	1,000
ANIMAL LEGAL DEFENSE FUND 170 E COTATI AVENUE COTATI, CA 94931	NONE	501 (C) (3)	CHARITABLE PURPOSE	2,000
ANIMALS' ANGELS PO BOX 1056 WESTMINSTER, MD 21158	NONE	501 (C) (3)	CHARITABLE PURPOSE	500
ARCHAEOLOGICAL CONSERVANCY 5301 CENTRAL AVENUE NE SUITE 902 ALBUQUERQUE, NM 87108	NONE	501 (C) (3)	CHARITABLE PURPOSE	250
ARIZONA HUMANE SOCIETY 1521 W DOBBINS ROAD PHOENIX, AZ 85041	NONE	501 (C) (3)	CHARITABLE PURPOSE	500
ARIZONA THEATRE COMPANY 400 E VAN BUREN SUITE 720 PHOENIX, AZ 85004	NONE	501 (C) (3)	CHARITABLE PURPOSE	250
ARTHRITIS FOUNDATION 1313 E OSBORN ROAD SUITE 200 PHOENIX, AZ 85014	NONE	501 (C) (3)	CHARITABLE PURPOSE	100
ASPCA 424 E 92ND STREET NEW YORK, NY 10128	NONE	501 (C) (3)	CHARITABLE PURPOSE	500
ASPEN CTR FOR ENVIRONMENTAL STUDIES 100 PUPPY SMITH STREET ASPEN, CO 81611	NONE	501 (C) (3)	CHARITABLE PURPOSE	500
ASPEN HISTORICAL SOCIETY 620 W BLEEKER ASPEN, CO 81611	NONE	501 (C) (3)	CHARITABLE PURPOSE	250
ASPEN PUBLIC RADIO 110 E HALLAM STREET SUITE 134 ASPEN, CO 81611	NONE	501 (C) (3)	CHARITABLE PURPOSE	1,000
ASPEN VALLEY HOSPITAL 401 CASTLE ROCK ROAD ASPEN, CO 81611	NONE	501 (C) (3)	CHARITABLE PURPOSE	500
BOY SCOUTS OF AMERICA 2969 N GREENFIELD ROAD PHOENIX, AZ 85016	NONE	501 (C) (3)	CHARITABLE PURPOSE	250
CASTLETON RANCH PO BOX 1226 LANCASTER, CA 93584	NONE	501 (C) (3)	CHARITABLE PURPOSE	500
Total  3a				108,374

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>				
CATHOLIC COMMUNITY FOUNDATION 400 E MONROE STREET PHOENIX,AZ 85004	NONE	501 (C) (3)	CHARITABLE PURPOSE	100
COMMON DREAMS PO BOX 443 PORTLAND,ME 04112	NONE	501 (C) (3)	CHARITABLE PURPOSE	1,000
CONTEMPLATIVE OUTREACH LIMITED 10 PARK PLACE BUTLER,NJ 07405	NONE	501 (C) (3)	CHARITBALE PURPOSE	500
CORNELL LAB OF ORNITHOLOGY 159 SAPSUCKER WOODS ROAD ITHACA,NY 14850	NONE	501 (C) (3)	CHARITABLE PURPOSE	250
COVENANT HOUSE 5 PENN PLAZA NEWYORK,NY 10001	NONE	501 (C) (3)	CHARITABLE PURPOSE	1,000
CROSIER FATHERS AND BROTHERS 4423 N 24TH STREET PHOENIX,AZ 85016	NONE	501 (C) (3)	CHARITABLE PURPOSE	1,000
CYSTIC FIBROSIS FOUNDATION 3800 N CENTRAL AVE PHOENIX,AZ 85012	NONE	501 (C) (3)	CHARITABLE PURPOSE	150
DEERFIELD ACADEMY PO BOX 306 DEERFIELD,MA 01342	NONE	501 (C) (3)	CHARITABLE PURPOSE	2,500
DEFENDERS OF WILDLIFE 1130 17TH STREET NW WASHINGTON DC,DC 20036	NONE	501 (C) (3)	CHARITABLE PURPOSE	1,000
DEMOCRACY NOW 207 W 25TH STREET NEWYORK,NY 10001	NONE	501 (C) (3)	CHARITABLE PURPOSE	1,000
DESERT FOOTHILLS LAND TRUST PO BOX 4861 CAVE CREEK,AZ 85327	NONE	501 (C) (3)	CHARITABLE PURPOSE	500
DIOCESE OF PHX-CDA 400 E MONROE STREET PHOENIX,AZ 85004	NONE	501 (C) (3)	CHARITABLE PURPOSE	3,000
DISABLED AMERICAN VETERANS PO BOX 14301 CINCINNATI,OH 45250	NONE	501 (C) (3)	CHARITABLE PURPOSE	100
DOCTORS WITHOUT BORDERS 333 7TH AVENUE NEWYORK,NY 10001	NONE	501 (C) (3)	CHARITABLE PURPOSE	1,000
EARTH JUSTICE 50 CALIFORNIA STREET SUITE 500 SAN FRANCISCO,CA 94111	NONE	501 (C) (3)	CHARITABLE PURPOSE	2,500
Total  3a				108,374

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				
ENVIRONMENTAL DEFENSE FUND 1875 CONNECTICUT AVE NW WASHINGTON DC,DC 20009	NONE	501 (C) (3)	CHARITABLE PURPOSE	2,500
FREE PRESS 40 MAIN STREET STE 301 FLORENCE,MA 01062	NONE	501 (C) (3)	CHARITABLE PURPOSE	500
FRIENDS OF EIGHT 555 N CENTRAL AVE PHOENIX,AZ 85004	NONE	501 (C) (3)	CHARITABLE PURPOSE	1,000
FRIENDS OF THE EARTH 1100 15TH STREET NW WASHINGTON DC,DC 20005	NONE	501 (C) (3)	CHARITABLE PURPOSE	500
FRIENDS OF THE SMITHSONIAN PO BOX 37012 WASHINGTON DC,DC 20013	NONE	501 (C) (3)	CHARITABLE PURPOSE	250
FUND FOR ANIMALS 200 W 57TH STREET NEW YORK,NY 10019	NONE	501 (C) (3)	CHARITABLE PURPOSE	250
GRAND CANYON TRUST 2601 N FORT VALLEY ROAD FLAGSTAFF,AZ 86001	NONE	501 (C) (3)	CHARITABLE PURPOSE	250
GREENPEACE FUND 702 H STREET NW WASHINGTON DC,DC 20001	NONE	501 (C) (3)	CHARITABLE PURPOSE	1,000
GUIDE DOG FOUNDATION FOR THE BLIND INC 371 E JERICHO TURNPIKE SMITHTOWN,NY 11787	NONE	501 (C) (3)	CHARITABLE PURPOSE	150
HABITAT FOR HUMANITY 115 E WATKINS STREET PHOENIX,AS 85004	NONE	501 (C) (3)	CHARITABLE PURPOSE	2,000
HAZELDON FOUNDATION PO BOX 176 CENTER CITY,MN 55012	NONE	501 (C) (3)	CHARITABLE PURPOSE	2,000
HEARD MUSEUM 2301 N CENTRAL AVE PHOENIX,AZ 85004	NONE	501 (C) (3)	CHARITABLE PURPOSE	1,000
HUMANE SOCIETY OF THE US 2100 L STREET NW WASHINGTON DC,DC 20037	NONE	501 (C) (3)	CHARITABLE PURPOSE	2,000
IN DEFENSE OF ANIMALS 3010 KERNER BLVD SAN RAFAEL,CA 94901	NONE	501 (C) (3)	CHARITABLE PURPOSE	500
INDEPENDENCE PASS FOUNDATION PO BOX 1700 ASPEN,CO 81612	NONE	501 (C) (3)	CHARITABLE PURPOSE	250
Total  3a				108,374

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				
INTERFAITH ALLIANCE FOUNDATION 1212 NEWYORK AVE WASHINGTON DC,DC 20005	NONE	501 (C) (3)	CHARITABLE PURPOSE	500
INTERNATIONAL FUND FOR ANIMAL WELFARE 1350 CONNECTICUT AVE NW WASHINGTON DC,DC 20036	NONE	501 (C) (3)	CHARITABLE PURPOSE	250
IRC (INTERNATIONAL RESCUE COMMITTEE) 122 E 42ND STREET NEWYORK,NY 10168	NONE	501 (C) (3)	CHARITABLE PURPOSE	100
KJZZ 2323 W 14TH STREET TEMPE,AZ 85281	NONE	501 (C) (3)	CHARITABLE PURPOSE	1,000
LAST CHANCE FOR ANIMALS 8033 SUNSET BLVD LOS ANGELES,CA 90046	NONE	501 (C) (3)	CHARITABLE PURPOSE	500
LEUKEMIA AND LYMPHOMA SOCIETY 3877 N 7TH STREET PHOENIX,AZ 85014	NONE	501 (C) (3)	CHARITABLE PURPOSE	150
LIFESAVERS WILD HORSE RESCUE RANCH 23809 E AVENUE J LANCASTER,CA 93535	NONE	501 (C) (3)	CHARITABLE PURPOSE	500
MACULAR DEGENERATION RESEARCH 22512 GATEWAY CENTER DRIVE CLARKSBURG,MD 20871	NONE	501 (C) (3)	CHARITABLE PURPOSE	500
MAKE A WISH FOUNDATION OF ARIZONA 711 E NORTHERN AVE PHOENIX,AZ 85020	NONE	501 (C) (3)	CHARITABLE PURPOSE	100
MARCH OF DIMES 7290 E BROADWAY BLVD TUCSON,AZ 85710	NONE	501 (C) (3)	CHARITABLE PURPOSE	100
MEHARRY MEDICAL COLLEGE 1005 DR DB TODD JR BLVD NASHVILLE,TN 37208	NONE	501 (C) (3)	CHARITABLE PURPOSE	500
MEMORIAL SLOAN-KETTERING CANCER CENTER 1275 YORK AVE NEWYORK,NY 10065	NONE	501 (C) (3)	CHARITABLE PURPOSE	1,000
MONTCLAIR KIMBERLEY ACADEMY 201 VALLERY ROAD MONTCLAIR,NJ 07042	NONE	501 (C) (3)	CHARITABLE PURPOSE	1,000
MUSEUM OF MODERN ART 11 W 53RD STREET NEWYORK,NY 10019	NONE	501 (C) (3)	CHARITABLE PURPOSE	500
MYSTIC SEAPORT 75 GREENMANVILLE AVE MYSTIC,CT 06355	NONE	501 (C) (3)	CHARITABLE PURPOSE	100
Total  3a				108,374

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				
NAACP 4805 MT HOPE DRIVE BALTIMORE,MD 21215	NONE	501 (C) (3)	CHARITABLE PURPOSE	500
NATIONAL FOUNDATION FOR CANCER RESEARCH 4600 E WEST HIGHWAY BETHESDA,MD 20814	NONE	501 (C) (3)	CHARITABLE PURPOSE	500
NATIONAL MULTIPLE SCLEROSIS SOCIETY 5025 E WASHINGTON STREET PHOENIX,AZ 85034	NONE	501 (C) (3)	CHARITABLE PURPOSE	150
NATIONAL MUSEUM OF THE AMERICAN INDIAN PO BOX 23473 WASHINGTON DC,DC 20026	NONE	501 (C) (3)	CHARITABLE PURPOSE	500
NATIONAL TRUST FOR HISTORIC PRESERVATION 1785 MASSACHUSETTS AVE NW WASHINGTON DC,DC 20036	NONE	501 (C) (3)	CHARITABLE PURPOSE	500
NATIONAL WILDLIFE FEDERATION 11000 WILDLIFE CENTER DRIVE RESTON,VA 20190	NONE	501 (C) (3)	CHARITABLE PURPOSE	1,000
NATURAL RESOURCE DEFENSE COUNCIL 40 WEST 20TH STREET NEW YORK,NY 10011	NONE	501 (C) (3)	CHARITABLE PURPOSE	5,000
NATURE CONSERVANCY 7600 N 15TH STREET PHOENIX,AZ 85020	NONE	501 (C) (3)	CHARITABLE PURPOSE	750
OXFAM AMERICA 226 CAUSEWAY STREET BOSTON,MA 02114	NONE	501 (C) (3)	CHARITABLE PURPOSE	500
PARKINSON RESEARCH FOUNDATION PO BOX 20256 SARASOTA,FL 34276	NONE	501 (C) (3)	CHARITABLE PURPOSE	500
PEACE FOR THE AMERICAN WAY FOUNDATION 1101 15TH STREET NW STE 600 WASHINGTON DC,DC 20005	NONE	501 (C) (3)	CHARITABLE PURPOSE	1,000
PETA 501 FRONT STREET NORFOLK,VA 23510	NONE	501 (C) (3)	CHARITABLE PURPOSE	500
PHOENIX RESCUE MISSION 1801 S 35TH AVENUE PHOENIX,AZ 85009	NONE	501 (C) (3)	CHARITABLE PURPOSE	500
PLANNED PARENTHOOD 434 W 33RD STREET NEW YORK,NY 10001	NONE	501 (C) (3)	CHARITABLE PURPOSE	600
PROJECT HOPE 255 CARTER HALL LANE MILLWOOD,VA 22646	NONE	501 (C) (3)	CHARITABLE PURPOSE	1,000
Total  3a				108,374

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				
PROJECT VOTE SMART 1 COMMON GROUND PHILIPSBURG,MT 59858	NONE	501 (C) (3)	CHARITABLE PURPOSE	500
PUBLIC CAMPAIGN 1133 19TH STREET NW WASHINGTON DC,DC 20036	NONE	501 (C) (3)	CHARITABLE PURPOSE	1,000
PUBLIC CITIZEN 1600 20TH STREET NW WASHINGTON DC,DC 20009	NONE	501 (C) (3)	CHARITABLE PURPOSE	330
RED ARROW CAMP FOUNDATION 780 N WATER STREET MILWAUKEE,WI 53202	NONE	501 (C) (3)	CHARITABLE PURPOSE	500
ROARING FORK CONSERVANCY PO BOX 3349 BASALT,CO 81621	NONE	501 (C) (3)	CHARITABLE PURPOSE	250
ROCKY MOUNTAIN INSTITUTE 1820 FOLSOM STREET BOULDER,CO 80302	NONE	501 (C) (3)	CHARITABLE PURPOSE	1,000
ROCKY MOUNTAIN PBS 1089 BANNOCK STREET DENVER,CO 80204	NONE	501 (C) (3)	CHARITABLE PURPOSE	500
SCOTTSDALE HEALTHCARE FOUNDATION 10001 N 92ND STREET SCOTTSDALE,AZ 85258	NONE	501 (C) (3)	CHARITABLE PURPOSE	1,000
SIERRA CLUB 202 E MCDOWELL ROAD PHOENIX,AZ 85004	NONE	501 (C) (3)	CHARITABLE PURPOSE	500
SOCIETY OF ST VINCENT DE PAUL PO BOX 13600 PHOENIX,AZ 85002	NONE	501 (C) (3)	CHARITABLE PURPOSE	100
SOUTHERN POVERTY LAW CTR 400 WASHINGTON AVE MONTGOMERY,AL 36104	NONE	501 (C) (3)	CHARITABLE PURPOSE	1,500
SPECIAL OLYMPICS 2100 S 75TH AVENUE PHOENIX,AZ 85043	NONE	501 (C) (3)	CHARITABLE PURPOSE	100
ST BENEDICT MONASTERY 1012 MONASTERY ROAD SNOWMASS,CO 81654	NONE	501 (C) (3)	CHARITABLE PURPOSE	7,500
ST MARY'S FOOD BANK ALLIANCE 2831 N 31ST AVENUE PHOENIX,AZ 85009	NONE	501 (C) (3)	CHARITABLE PURPOSE	100
STUDENT CONSERVATION ASSOCIATION 689 RIVER ROAD CHARLESTOWN,NH 03603	NONE	501 (C) (3)	CHARITABLE PURPOSE	500
Total  3a				108,374

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>				
TECHNOSERVE 1120 19TH STREET NW WASHINGTON DC,DC 20036	NONE	501 (C) (3)	CHARITABLE PURPOSE	250
TRUTHOUT PO BOX 276414 SACRAMENTO,CA 95827	NONE	501 (C) (3)	CHARITABLE PURPOSE	1,500
UNION OF CONCERNED SCIENTISTS 1825 K ST NE STE 800 WASHINGTON DC,DC 20006	NONE	501 (C) (3)	CHARITABLE PURPOSE	2,000
UNITED NEGRO COLLEGE FUND 8260 WILLOW OAKS CORPORATE DRIVE FAIRFAX,VA 22031	NONE	501 (C) (3)	CHARITABLE PURPOSE	500
USGA PO BOX 708 FAR HILLS,NJ 07931	NONE	501 (C) (3)	CHARITABLE PURPOSE	300
WILDERNESS SOCIETY 1615 M STREET NW WASHINGTON DC,DC 20036	NONE	501 (C) (3)	CHARITABLE PURPOSE	5,000
WILLIAM COLLEGE MUSEUM OF ART 75 PARK STREET WILLIAMSTOWN,MA 01267	NONE	501 (C) (3)	CHARITABLE PURPOSE	1,000
WILLIAMS COLLEGE ALUMNI FUND 75 PARK STREET WILLIAMSTOWN,MA 01267	NONE	501 (C) (3)	CHARITABLE PURPOSE	7,000
WINDWALKERS PO BOX 504 CARBONDALE,CO 81623	NONE	501 (C) (3)	CHARITABLE PURPOSE	500
WORLD WILDLIFE FUND 1250 24TH STREET NW WASHINGTON DC,DC 20037	NONE	501 (C) (3)	CHARITABLE PURPOSE	3,500
Total  3a				108,374

TY 2013 Accounting Fees Schedule

Name: THE SUSAN AND FORD SCHUMANN FOUNDATION
C/O HENRY & HORNE LLP

EIN: 86-0553890

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
HENRY & HORNE, LLP	7,041	5,633		1,408

**TY 2013 Investments Corporate
Stock Schedule**

Name: THE SUSAN AND FORD SCHUMANN FOUNDATION
C/O HENRY & HORNE LLP

EIN: 86-0553890

Name of Stock	End of Year Book Value	End of Year Fair Market Value
CAPITAL INCOME BUILDERS INC	1,522,690	1,711,191
EUROPACIFIC GROWTH FUND	264,654	359,545
GROWTH FUND OF AMERICA INC	1,001,602	1,484,162

TY 2013 Legal Fees Schedule

Name: THE SUSAN AND FORD SCHUMANN FOUNDATION
C/O HENRY & HORNE LLP

EIN: 86-0553890

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL	926	741		185

TY 2013 Other Expenses Schedule

Name: THE SUSAN AND FORD SCHUMANN FOUNDATION
C/O HENRY & HORNE LLP
EIN: 86-0553890

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
OFFICE EXPENSE	76	76		0

TY 2013 Other Professional Fees Schedule**Name:** THE SUSAN AND FORD SCHUMANN FOUNDATION

C/O HENRY & HORNE LLP

EIN: 86-0553890

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
CAPITAL GUARDIAN MANAGEMENT FEES	9,588	9,588		0

TY 2013 Taxes Schedule

Name: THE SUSAN AND FORD SCHUMANN FOUNDATION
C/O HENRY & HORNE LLP

EIN: 86-0553890

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL EXCISE TAX	1,543	0		0
FOREIGN TAX	672	672		0