



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



Form 990-PF

Department of the Treasury  
Internal Revenue ServiceReturn of Private Foundation  
or Section 4947(a)(1) Trust Treated as Private Foundation

OMB No 1545-0052

2013

Open to Public Inspection

For calendar year 2013 or tax year beginning

, and ending ~~2013~~

Name of foundation

ROBERTS FAMILY FOUNDATION

Number and street (or P O box number if mail is not delivered to street address)

425 EAST 165 SOUTH

City or town, state or province, country, and ZIP or foreign postal code

IVINS UT 84738

1030 MAY 12 2014 IRISCS  
OODEN, UT

G Check all that apply

<input type="checkbox"/> Initial return	<input type="checkbox"/> Initial return of a former public charity
<input type="checkbox"/> Final return	<input type="checkbox"/> Amended return
<input checked="" type="checkbox"/> Address change	<input type="checkbox"/> Name change

H Check type of organization  Section 501(c)(3) exempt private foundation Section 4947(a)(1) nonexempt charitable trust  Other taxable private foundationI Fair market value of all assets at  
end of year (from Part II, col (c),  
line 16) ► \$ 2,083,846 (Part I, column (d) must be on cash basis )J Accounting method  Cash  Accrual  
 Other (specify)

A Employer identification number

88-0513653

B Telephone number (see instructions)

702-293-6068

C If exemption application is pending, check here ►

D 1 Foreign organizations, check here ►

2 Foreign organizations meeting the  
85% test, check here and attach computation ►E If private foundation status was terminated under  
section 507(b)(1)(A), check here ►F If the foundation is in a 60-month termination  
under section 507(b)(1)(B), check here ►

Part I Operating and Administrative Expenses	Revenue			
	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received (attach schedule)				
2 Check ► <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
3 Interest on savings and temporary cash investments	116,238	116,238	116,238	
4 Dividends and interest from securities	10,485	10,485	10,485	
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	STMT 1	61,012		
b Gross sales price for all assets on line 6a		348,971		
7 Capital gain net income (from Part IV, line 2)		2,556		0
8 Net short-term capital gain				
9 Income modifications				
10a Gross sales less returns and allowances				
b Less Cost of goods sold				
c Gross profit or (loss) (attach schedule)				
11 Other income (attach schedule)	STMT 2	1,233,774	1,233,774	
12 Total. Add lines 1 through 11		1,421,509	129,279	1,360,497
13 Compensation of officers, directors, trustees, etc		0		
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16a Legal fees (attach schedule)	SEE STMT 3	90		90
b Accounting fees (attach schedule)	STMT 4	500		500
c Other professional fees (attach schedule)	STMT 5	4,008	4,008	4,008
17 Interest		99,543		99,543
18 Taxes (attach schedule) (see instructions)	STMT 6	24		24
19 Depreciation (attach schedule) and depletion				
20 Occupancy		3,013		3,013
21 Travel, conferences, and meetings		485		485
22 Printing and publications				
23 Other expenses (att sch)	STMT 7	1,022,670		1,022,670
24 Total operating and administrative expenses.		1,130,333	4,008	1,130,333
Add lines 13 through 23				0
25 Contributions, gifts, grants paid		102,666		102,666
26 Total expenses and disbursements. Add lines 24 and 25		1,232,999	4,008	1,130,333
27 Subtract line 26 from line 12		188,510		102,666
a Excess of revenue over expenses and disbursements				
b Net investment income (if negative, enter -0-)			125,271	
c Adjusted net income (if negative, enter -0-)				230,164

For Paperwork Reduction Act Notice, see instructions.

DAA

Form 990-PF (2013)

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		380,110	85,493	85,493
	2 Savings and temporary cash investments		123,619	82,292	82,292
	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 (att schedule) ► SEE WRK	9,644	0	9,644	9,644
	Less allowance for doubtful accounts ►				
	8 Inventories for sale or use		765,493	1,242,819	1,242,819
	9 Prepaid expenses and deferred charges				
	10a Investments – U S and state government obligations (attach schedule)	STMT 8		112,961	112,961
	b Investments – corporate stock (attach schedule)	SEE STMT 9	206,542	217,163	217,163
	c Investments – corporate bonds (attach schedule)	SEE STMT 10	253,037	161,138	161,138
Liabilities	11 Investments – land, buildings, and equipment basis ►				
	Less accumulated depreciation (attach sch) ►				
	12 Investments – mortgage loans				
	13 Investments – other (attach schedule)	SEE STATEMENT 11	222,734	172,336	172,336
	14 Land, buildings, and equipment basis ►				
	Less accumulated depreciation (attach sch) ►				
	15 Other assets (describe ►	)			
	16 Total assets (to be completed by all filers – see the instructions Also, see page 1, item I)		1,951,535	2,083,846	2,083,846
	17 Accounts payable and accrued expenses		11,007	9,045	
	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 ►	)	11,007	9,045	
	23 Total liabilities (add lines 17 through 22)				
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.		► <input type="checkbox"/>		
	24 Unrestricted				
	25 Temporarily restricted				
	26 Permanently restricted				
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.		► <input checked="" type="checkbox"/>		
	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		1,940,528	2,074,801	
	30 Total net assets or fund balances (see instructions)		1,940,528	2,074,801	
	31 Total liabilities and net assets/fund balances (see instructions)		1,951,535	2,083,846	

## 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	1,940,528
2 Enter amount from Part I, line 27a	2	188,510
3 Other increases not included in line 2 (itemize) ► SEE STATEMENT 12	3	18,763
4 Add lines 1, 2, and 3	4	2,147,801
5 Decreases not included in line 2 (itemize) ► SEE STATEMENT 13	5	73,000
6 Total net assets or fund balances at end of year (line 4 minus line 5) – Part II, column (b), line 30	6	2,074,801

## Part IV · Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)			(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
<b>1a CAPITAL GAIN DISTRIBUTION</b>					
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 2,556			2,556		
b					
c					
d					
e					
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				(i) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))	
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any			
a					2,556
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	2,556	
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 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	86,039	2,006,200	0.042887
2011	69,918	1,834,647	0.038110
2010	68,213	1,576,460	0.043270
2009	55,704	1,377,701	0.040433
2008	66,701	1,189,726	0.056064

2 Total of line 1, column (d)

2 0.220764

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 0.044153

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

4 1,987,426

5 Multiply line 4 by line 3

5 87,751

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

6 1,253

7 Add lines 5 and 6

7 89,004

8 Enter qualifying distributions from Part XII, line 4

8 102,666

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ► <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter (attach copy of letter if necessary—see instructions)	►	1	1,253
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ► <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		2	0
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)		3	1,253
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	0
3	Add lines 1 and 2		5	1,253
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			
5	<b>Tax based on investment income.</b> Subtract line 4 from line 3 If zero or less, enter -0-			
6	Credits/Payments			
a	2013 estimated tax payments and 2012 overpayment credited to 2013	6a		
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		
8	Enter any penalty for underpayment of estimated tax Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8	19	
9	<b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter amount owed	9	1,272	
10	<b>Overpayment.</b> 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 <b>Credited to 2014 estimated tax</b> ►	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		<input checked="" type="checkbox"/>	
1b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities	Yes	No
1b		<input checked="" type="checkbox"/>	
1c	Did the foundation file Form 1120-POL for this year?	Yes	No
1c		<input checked="" type="checkbox"/>	
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? If "Yes," attach a detailed description of the activities	Yes	No
2		<input checked="" type="checkbox"/>	
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	Yes	No
3		<input checked="" type="checkbox"/>	
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	Yes	No
4a		<input checked="" type="checkbox"/>	
b	If "Yes," has it filed a tax return on Form 990-T for this year?	Yes	No
4b		<input checked="" type="checkbox"/>	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T	Yes	No
5		<input checked="" type="checkbox"/>	
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?	Yes	No
6		<input checked="" type="checkbox"/>	
7	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	Yes	No
7		<input checked="" type="checkbox"/>	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ► <b>NV</b>	Yes	No
8a		<input checked="" type="checkbox"/>	
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	Yes	No
8b		<input checked="" type="checkbox"/>	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? If "Yes," complete Part XIV	Yes	No
9		<input checked="" type="checkbox"/>	
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	Yes	No
10		<input checked="" type="checkbox"/>	

**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	<input checked="" type="checkbox"/>
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	<input checked="" type="checkbox"/>
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <b>N/A</b>	13	<input checked="" type="checkbox"/>
14	The books are in care of ► <b>DENNIS ROBERTS</b> <b>425 E 165 S</b>	Telephone no ► <b>702-293-6068</b>	
	Located at ► <b>IVINS</b>	UT	ZIP+4 ► <b>84738</b>
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of <b>Form 1041</b> – 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 the instructions for exceptions and filing requirements for Form TD F 90-22 1 If "Yes," enter the name of the foreign country ►	16	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> 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
1a	During the year did the foundation (either directly or indirectly)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
b	If any answer is "Yes" to 1a(1)–(6), did <b>any</b> of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here	<b>N/A</b>
c	► 1b Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?	<b>N/A</b>
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))	
a	At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? If "Yes," list the years ► <b>20 12 , 20 11 , 20 10 , 20</b>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
b	Are there any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement – see instructions)	<b>2b</b> <input checked="" type="checkbox"/>
c	If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here ► <b>20 11 , 20 10 , 20</b>	
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
b	If "Yes," did it have excess business holdings in 2013 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013)	<b>N/A</b>
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	<b>3b</b>
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?	<b>4a</b> <input checked="" type="checkbox"/>
		<b>4b</b> <input checked="" type="checkbox"/>

## 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	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If any answer is "Yes" to 5a(1)–(5), did <b>any</b> 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	<b>N/A</b>	<b>5b</b>		
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? If "Yes," attach the statement required by Regulations section 53.4945–5(d)	<b>N/A</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No		
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870	<b>6b</b>			<b>X</b>
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?	<b>N/A</b>	<b>7b</b>		

## 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
DENNIS ROBERTS 425 EAST 165 SOUTH	IVINS UT 84738	DIRECTOR 0.00	0	0
NYLA ROBERTS 425 EAST 165 SOUTH	IVINS UT 84738	DIRECTOR 0.00	0	0
ROYCE J RICHARDS 2490 WALL AVENUE	OGDEN UT 84401	DIRECTOR 0.00	0	0

## 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 \$60,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

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

► 0

Form 990-PF (2013)

**Part 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 ►

**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 N/A

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 N/A

2

All other program-related investments. See instructions

3

Total. Add lines 1 through 3 ►

Form 990-PF (2013)

**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	672,956
b	Average of monthly cash balances	1b	335,757
c	Fair market value of all other assets (see instructions)	1c	1,008,978
d	<b>Total</b> (add lines 1a, b, and c)	1d	2,017,691
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	2,017,691
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	30,265
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3 Enter here and on Part V, line 4	5	1,987,426
6	<b>Minimum investment return.</b> Enter 5% of line 5	6	99,371

**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	99,371
2a	Tax on investment income for 2013 from Part VI, line 5	2a	1,253
b	Income tax for 2013 (This does not include the tax from Part VI )	2b	
c	Add lines 2a and 2b	2c	1,253
3	Distributable amount before adjustments Subtract line 2c from line 1	3	98,118
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	98,118
6	Deduction from distributable amount (see instructions)	6	
7	<b>Distributable amount as adjusted</b> Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	98,118

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

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes	1a	102,666
a	Expenses, contributions, gifts, etc – total from Part I, column (d), line 26	1b	
b	Program-related investments – total from Part IX-B	2	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	3a	
3	Amounts set aside for specific charitable projects that satisfy the	3b	
a	Suitability test (prior IRS approval required)	4	102,666
b	Cash distribution test (attach the required schedule)	5	1,253
4	<b>Qualifying distributions.</b> Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	6	101,413
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)		
6	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4		
	<b>Note.</b> The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years		

## Form 990-PF (2013) ROBERTS FAMILY FOUNDATION

88-0513653

Page 9

## 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				98,118
2 Undistributed income, if any, as of the end of 2013			99,483	
a Enter amount for 2012 only		12,319		
b Total for prior years 20 <u>10</u> , 20 <u>11</u> , 20 <u>  </u>				
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 ► \$ <u>102,666</u>			99,483	
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				3,183
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		12,319		
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		12,319		
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				94,935
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				►		
b	Check box to indicate whether the foundation is a private operating foundation described in section				<input type="checkbox"/> 4942(j)(3) or <input type="checkbox"/> 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						(e) Total
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 foundation had \$5,000 or more in assets at any time during the year – see instructions.)****1 Information Regarding Foundation Managers:**

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

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  
**N/A**

**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

**DENNIS ROBERTS 702-271-2605  
1400 COLORADO STREET BOULDER CITY NV 89005**

b The form in which applications should be submitted and information and materials they should include  
**SEE STATEMENT 14**

c Any submission deadlines

**THERE ARE NO SUBMISSION DEADLINES.**

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

**THERE ARE NO RESTRICTIONS ON THE AWARDS.**

## 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 <b>SEE STATEMENT 15</b>				<b>102,666</b>
<b>Total</b>			► 3a	<b>102,666</b>
b Approved for future payment <b>N/A</b>				
<b>Total</b>			► 3b	

Form 990-PF (2013) **ROBERTS FAMILY FOUNDATION**  
**Part XVI-A Analysis of Income-Producing Activities****88-0513653**Page **12**

Enter gross amounts unless otherwise indicated

1 Program service revenue

a **SALE OF INVENTORY**b  
c  
d  
e  
f

g Fees and contracts from government agencies

2 Membership dues and assessments

3 Interest on savings and temporary cash investments

4 Dividends and interest from securities

5 Net rental income or (loss) from real estate

a Debt-financed property

b Not debt-financed property

6 Net rental income or (loss) from personal property

7 Other investment income

8 Gain or (loss) from sales of assets other than inventory

9 Net income or (loss) from special events

10 Gross profit or (loss) from sales of inventory

11 Other revenue a

b **7F PROPERTIES LLC**c  
d  
e

12 Subtotal Add columns (b), (d), and (e)

13 Total. Add line 12, columns (b), (d), and (e)

(See worksheet in line 13 instructions to verify calculations)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions)
10	<b>THE SOLE PURPOSE OF BUYING AND SELLING THE INVENTORY IS TO PROVIDE ADDITIONAL FUNDS FOR CHARITABLE DONATIONS. THE TRUSTEES OF THE FOUNDATION DO NOT RECEIVE ANY COMPENSATION IN ANY FORM FOR PERFORMING THESE ACTIVITIES.</b>

**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 or**

- (1) Cash
- (2) Other assets

**b** Other transactions

- (1) Sales of assets to a noncharitable exempt organization
- (2) Purchases of assets from a noncharitable exempt organization
- (3) Rental of facilities, equipment, or other assets
- (4) Reimbursement arrangements
- (5) Loans or loan guarantees
- (6) Performance of services or membership or fundraising solicitations

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

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.

**2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?

| Yes |  | No

**b** If "Yes," complete the following schedule.

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

Sign  
Lang

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

May the IRS discuss this return  
with the preparer shown below  
(see instructions)?  Yes  No

 *Nyla*  
Signature of officer or trustee

4/3/14

Dat

Trustee

DIRECTOR

Title

Paid Preparer Use Only	Print/Type preparer's name  <b>ROYCE RICHARDS</b>	Preparer's signature  <b>ROYCE RICHARDS</b>	Date  <b>03/28/14</b>	Check <input type="checkbox"/> if self-employed
	Firm's name ► <b>WOOD, RICHARDS, &amp; ASSOCIATES, PC CPA</b>	PTIN  <b>P00006948</b>		
	Firm's address ► <b>2490 WALL AVE OGDEN, UT 84401</b>	Firm's EIN ► <b>87-0491872</b>	Phone no <b>801-621-0440</b>	

**Federal Statements****Statement 1 - Form 990-PF, Part I, Line 6a - Sale of Assets**

Description		How Received		Whom Sold		Date Acquired
Date Sold	Sale Price	Cost	Expense	Depreciation	Net Gain / Loss	
CHARLES SCHWAB BOX A SHORT 11/25/13	\$ 39,107	\$ 36,500	\$ PURCHASE	\$	\$ 2,607	4/18/13
CHARLES SCHWAB BOX B SHORT 11/26/13	20,675	23,808	PURCHASE			5/14/13
CHARLES SCHWAB BOX A LONG 11/25/13	13,507	15,536	PURCHASE			10/18/12
CHARLES SCHWAB BOX B LONG 4/16/13	273,126	212,115	PURCHASE			-2,029
TOTAL	\$ 346,415	\$ 287,959	\$ 0	\$ 0	\$ 58,456	5/15/09

**Statement 2 - Form 990-PF, Part I, Line 11 - Other Income**

Description	Revenue per Books	Net Investment Income	Adjusted Net Income
SALE OF INVENTORY	\$ 1,119,892	\$	\$ 1,119,892
7F PROPERTIES LLC	113,882		113,882
TOTAL	\$ 1,233,774	\$ 0	\$ 1,233,774

**Statement 3 - Form 990-PF, Part I, Line 16a - Legal Fees**

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
SALE OF INVENTORY	\$ 90	\$	\$ 90	\$
TOTAL	\$ 90	\$ 0	\$ 90	\$ 0

**Federal Statements****Statement 4 - Form 990-PF, Part I, Line 16b - Accounting Fees**

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
SALE OF INVENTORY	\$ 500	\$ 500	\$ 500	\$ 500
TOTAL	\$ 500	\$ 0	\$ 500	\$ 0

**Statement 5 - Form 990-PF, Part I, Line 16c - Other Professional Fees**

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
ACCOUNT MANAGEMENT FEES	\$ 4,008	\$ 4,008	\$ 4,008	\$ 4,008
TOTAL	\$ 4,008	\$ 4,008	\$ 4,008	\$ 0

**Statement 6 - Form 990-PF, Part I, Line 18 - Taxes**

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
SALE OF INVENTORY	\$ 24	\$ 24	\$ 24	\$ 24
TOTAL	\$ 24	\$ 0	\$ 24	\$ 0

**Statement 7 - Form 990-PF, Part I, Line 23 - Other Expenses**

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
SALE OF INVENTORY	\$	\$	\$	\$
INSURANCE	3,685		3,685	
AUTO	309		309	
BANK SERVICE CHARGES	156		156	
COMPUTER EXPENSES	909		909	
FUEL	2,901		2,901	
1/2 MEALS & ENTERTAINMENT	1,013		1,013	

**Federal Statements****Statement 7 - Form 990-PF, Part I, Line 23 - Other Expenses (continued)**

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
OFFICE SUPPLIES	\$ 163	\$ 163	\$ 163	\$ 163
POSTAGE	181		181	
RENT	918		918	
SECURITY	208		208	
TELEPHONE	1,244		1,244	
SMALL TOOL PURCHASES	1,092		1,092	
UTILITIES	392		392	
ADVERTISING	1,909		1,909	
COST OF GOODS SOLD	1,003,487		1,003,487	
EXPENSES				
BANK SERVICE CHARGES	43		43	
PROFESSIONAL FEES	4,060		4,060	
<b>TOTAL</b>	<b>\$ 1,022,670</b>	<b>\$ 0</b>	<b>\$ 1,022,670</b>	<b>\$ 0</b>

**Statement 8 - Form 990-PF, Part II, Line 10a - US and State Government Investments**

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
CHARLES SCHWAB MUNI FUNDS	\$ 112,961	\$ 112,961	MARKET	\$ 112,961
<b>TOTAL</b>	<b>\$ 0</b>	<b>\$ 112,961</b>		<b>\$ 112,961</b>

**Statement 9 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments**

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
CHARLES SCHWAB MUTUAL FUNDS	\$ 206,542	\$ 160,183	MARKET	\$ 160,183
CHARLES SCHWAB STOCK ACCOUNTS		22,133	MARKET	22,133

**Federal Statements****Statement 9 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments (continued)**

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
CHARLES SCHWAB OTHER HOLDINGS	\$	\$ 20,584	MARKET	\$ 20,584
CHARLES SCHWAB STOCK ACCOUNTS		14,263	MARKET	14,263
<b>TOTAL</b>	<b>\$ 206,542</b>	<b>\$ 217,163</b>		<b>\$ 217,163</b>

**Statement 10 - Form 990-PF, Part II, Line 10c - Corporate Bond Investments**

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
CHARLES SCHWAB CORPORATE BONDS	\$ 33,611	\$ 27,625	MARKET	\$ 27,625
CHARLES SCHWAB BOND FUNDS	219,426	133,513	MARKET	133,513
<b>TOTAL</b>	<b>\$ 253,037</b>	<b>\$ 161,138</b>		<b>\$ 161,138</b>

**Statement 11 - Form 990-PF, Part II, Line 13 - Other Investments**

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
7F PROPERTIES LLC - 14% INTEREST	\$ 129,893	\$ 172,336	COST	\$ 172,336
CHARLES SCHWAB OTHER ASSETS	92,841		MARKET	
<b>TOTAL</b>	<b>\$ 222,734</b>	<b>\$ 172,336</b>		<b>\$ 172,336</b>

**Statement 12 - Form 990-PF, Part III, Line 3 - Other Increases**

Description	Amount
UNREALIZED GAIN	\$ 18,763
<b>TOTAL</b>	<b>\$ 18,763</b>

**Federal Statements****Statement 13 - Form 990-PF, Part III, Line 5 - Other Decreases**

Description	Amount
DISTRIBUTIONS FROM 7F PROPERTIES	\$ 73,000
TOTAL	\$ 73,000

**Statement 14 - Form 990-PF, Part XV, Line 2b - Application Format and Required Contents**

Description
DESCRIPTION OF THE PURPOSE OF SOLICITED GRANT OR DONATION.
THE NAME OF THE DONEE, ADDRESS, PHONE NUMBER, NATURE OF DONEE'S OPERATIONS AND THE USE OF THE FUNDS MUST BE SUBMITTED BY THE DONEE.

**Form 990-PF, Part XV, Line 2c - Submission Deadlines**

Description
THERE ARE NO SUBMISSION DEADLINES.

**Form 990-PF, Part XV, Line 2d - Award Restrictions or Limitations**

Description
THERE ARE NO RESTRICTIONS ON THE AWARDS.

**Statement 15 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year**

Name		Address	
Relationship	Status	Purpose	Amount
LDS CHURCH		15 E SOUTH TEMPLE 2ND FLO	SALT LAKE CITY UT 84150
NONE		MISSIONARY ACTIVITIES	61,266
VEGAS PBS		3050 EAST FLAMINGO ROAD	LAS VEGAS NV 89121
NONE		PUBLIC FOUNDATION	
WORLD VISION		P O BOX 9716	FEDERAL WAY WA 98063
NONE		PUBLIC FOUNDATION	5,400
TUACAHN BOOSTERS		100 TUACHAN DRIVE	IVINS UT 84738
NONE		PUBLIC FOUNDATION	
DANCE ETC		525 HOTEL PLAZA	BOULDER CITY NV 89005
NONE		PUBLIC FOUNDATION	
AMERICAN PARKINSONS DISEASE ASSOCIA		520 WAKARA WAY	SALT LAKE CITY UT 84108
NONE		PUBLIC FOUNDATION	
CURE SEARCH		4600 E WEST HIGHWAY #600	BETHESDA MD 20814
NONE		PUBLIC FOUNDATION	
TUACHAN AMPHITHEATRE		100 TUACHAN DRIVE	IVINS UT 84738
NONE		PUBLIC GRANT	
EMPOWER PLAYGROUNDS	501C3	3214 N UNIVERSITY AVE	PROVO UT 84604
NON		ENHANCE EDUCATION IN RURAL VILLAGES	29,000
DIXIE STATE UNIVERSITY		225 S 700 E	ST GEORGE UT 84770
NONE	STATE UNIVER	EDUCATION	3,000

77928000E ROBERTS FAMILY FOUNDATION

3/28/2014

88-0513653

## Federal Statements

FYE: 12/31/2013

### Statement 15 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year (continued)

Name	Address	Address	
Relationship	Status	Purpose	Amount
ELISEO	ASSISTANCE FOR THE NEEDY	3,000	
NATIONAL MS SOCIETY	1440 FOOTHILL DR STE 200	SALT LAKE CITY UT 84108	
NONE	CURING MS	1,000	
TOTAL			<u>102,666</u>