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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 STOCKDALE FAMILY FOUNDATION		A Employer identification number 91-1663715	
Number and street (or P O box number if mail is not delivered to street address) 2720 SOUNDVIEW DRIVE WEST		Room/suite	B Telephone number (see instructions) (253) 572-8568
City or town, state or province, country, and ZIP or foreign postal code UNIVERSITY PLACE, WA 98466		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 1,377,581		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	
J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)			

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)				
	2 Check ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	2	2	2	
	4 Dividends and interest from securities.	26,852	26,852	26,852	
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	19,342			
	b Gross sales price for all assets on line 6a 68,379				
	7 Capital gain net income (from Part IV , line 2) . . .		19,342		
	8 Net short-term capital gain			1	
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	46,196	46,196	26,855	
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	 700			
	c Other professional fees (attach schedule)	 12,133	12,133		
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	 975	625		
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)				
	24 Total operating and administrative expenses. Add lines 13 through 23	13,808	12,758		0
	25 Contributions, gifts, grants paid	60,000			60,000
	26 Total expenses and disbursements. Add lines 24 and 25	73,808	12,758		60,000
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-27,612			
	b Net investment income (if negative, enter -0-)		33,438		
	c Adjusted net income (if negative, enter -0-)			26,855	

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	2	196	196
	2	Savings and temporary cash investments	8,593	-1,143	-1,143
	3	Accounts receivable ▶ 11,883			
		Less allowance for doubtful accounts ▶		11,883	11,883
	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)	716,900	693,524	1,293,914
	c	Investments—corporate bonds (attach schedule).	36,114	29,537	72,731
	11	Investments—land, buildings, and equipment basis ▶			
Liabilities		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)	761,609	733,997	1,377,581
	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	
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	761,609	733,997	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	Total net assets or fund balances (see page 17 of the instructions)	761,609	733,997	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	761,609	733,997	

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	761,609
2	Enter amount from Part I, line 27a	2	-27,612
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	733,997
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	733,997

Part IV

Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)		
1a						
(e) Gross sales price		(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale		(h) Gain or (loss) (e) plus (f) minus (g)	
a						
b						
c						
d						
e						
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69					(i) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))	
(i) F M V as of 12/31/69		(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any			
a						
b						
c						
d						
e						
2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }				2	19,342
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	1

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	50,000	1,056,271	0 04734		
2011	50,000	1,082,048	0 04621		
2010	49,766	991,217	0 05021		
2009	50,991	859,513	0 05933		
2008	43,500	1,031,383	0 04218		
2 Total of line 1, column (d).				2	0 24525
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 04905
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.				4	1,236,313
5 Multiply line 4 by line 3.				5	60,642
6 Enter 1% of net investment income (1% of Part I, line 27b).				6	334
7 Add lines 5 and 6.				7	60,976
8 Enter qualifying distributions from Part XII, line 4.				8	60,000

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

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)		
1a Exempt operating foundations described in section 4940(d)(2), check here ☐ 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	669
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	
3 Add lines 1 and 2.	3	669
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	669
6 Credits/Payments		
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	869
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	869
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	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid . . . ☐	10	200
11 Enter the amount of line 10 to be Credited to 2014 estimated tax ☐ 200 Refunded ☐	11	

Part VII-A Statements Regarding Activities			
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	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)? <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.</i>	1b		No
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		No
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) ☐ WA _____			
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 N/A				
14	The books are in care of RONALD STOCKDALE Telephone no (253) 572-8568 Located at 2720 SOUNDVIEW DRIVE WEST UNIVERSITY PLACE WA ZIP +4 984661700			
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? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (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)? (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).			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here.	1b		No
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? 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		No
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?			
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.).	3b		No
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

b

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

5b

No

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

b

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

6b

No

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

7a

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

YesNo

b

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

7b

No

Part VIII

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

1

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

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

2

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

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

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

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Part VIII

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	
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.	

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	1,229,669
b	Average of monthly cash balances.	1b	25,471
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	1,255,140
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	
3	Subtract line 2 from line 1d.	3	1,255,140
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	18,827
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	1,236,313
6	Minimum investment return. Enter 5% of line 5.	6	61,816

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	61,816
2a	Tax on investment income for 2013 from Part VI, line 5.	2a	669
b	Income tax for 2013 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	669
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	61,147
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	61,147
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	61,147

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	60,000
b	Program-related investments—total from Part IX-B.	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	60,000
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions).	5	
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	60,000
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				61,147
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only.			48,096	
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2013				
a From 2008.				
b From 2009.				
c From 2010.				
d From 2011.				
e From 2012.				
f Total of lines 3a through e.				
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 60,000				
a Applied to 2012, but not more than line 2a			48,096	
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2013 distributable amount.				11,904
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b.				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d Subtract line 6c from line 6b Taxable amount—see instructions				
e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount—see instructions				
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014				49,243
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

7

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

1

See Additional Data Table

• 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

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	60,000
b Approved for future payment				
Total			3b	

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2013)

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
RONALD A STOCKDALE	President 12 00	0		
2720 SOUNDVIEW DR WEST TACOMA,WA 98466				
BRYAN R STOCKDALE	Director 1 00	0		
3120 TYEE UNIVERSITY PLACE,WA 98466				
RUSSELL A STOCKDALE	Director 1 00	0		
14143 171ST AVE N E WOODINVILLE,WA 98072				
PAUL R STOCKDALE	Director 1 00	0		
1045 ROSEWOOD FIRCREST,WA 98466				
CAROL A STOCKDALE	SEC-TREA 5 00	0		
2720 SOUNDVIEW DR WEST TACOMA,WA 98466				

Form 990PF Part XV Line 1a - 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).

RONALD A STOCKDALE
CAROL A STOCKDALE

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>				
SAN FRANCISCO THEOL SEM 2 KENSINGTON RD SAN ANSELMO,CA 94960	NONE	PUBLIC	GENERAL FUND	2,500
J C SMITH THEOL SEMINARY 700 M L KING JR DRIVE S W ATLANTA,GA 30314	NONE	PUBLIC	GENERAL FUND	1,000
GRADUATE THEOLOGICAL UN 2400 RIDGE ROAD BERKELEY,CA 94709	NONE	PUBLIC	GENERAL FUND	500
R M PALMER MINORITY SCHOL P O BOX 7119 TACOMA,WA 98406	NONE	PUBLIC	SCHOLARSHIPS	5,000
BOYS GIRLS CLUB 705 FRONTAGE ROAD SUITE B KENAI,AK 99611	NONE	PUBLIC	GENERAL FUND	500
UNIV OF DUBUQUE 2000 UNIVERSITY AVE DUBUQUE,IA 52001	NONE	PUBLIC	GENERAL FUND & ENDOWMENT	21,000
NORTHWEST BEHAVIORIAL ASSOC 3003 NORTHRUP WAY SUITE 200 BELLEVUE,WA 98004	NONE	PUBLIC	GENERAL FUND	1,000
LIFT UP AFRICA P O BOX 3112 WOBURN,MA 01888	NONE	PUBLIC	GENERAL PUBLIC	6,000
BIBLE STUDY FELLOWSHIP BSF INT'L LL 19001 HUEBNER ROAD SAN ANTONIO,TX 78258	NONE	PUBLIC	GENERAL PUBLIC	2,000
WORLD VISION P O BOX 70266 TACOMA,WA 98471	NONE	PUBLIC	GENERAL PUBLIC	7,000
AUTISM SPEAKS 1060 STATE STREET ROAD PRINCETON,NJ 08540	NONE	PUBLIC	GENERAL PUBLIC	5,000
TRINITY PRESBYTERIAN CHURCH 1619 6TH AVENUE TACOMA,WA 98405	NONE	PUBLIC	EDUCATION	5,000
PRESBYTERIAN CHURCH USA 100 WITHERSPOON STREET LOUISVILLE,KY 40202	NONE	PUBLIC	DISASTER RELEIF	1,000
YOUTH FOR CHRIST P O BOX 834 TACOMA,WA 98401	NONE	501 C 3	TILLICUM YOUTH AND FAMILY CENTER	2,500
Total  3a				60,000

TY 2013 Accounting Fees Schedule**Name:** THE STOCKDALE FAMILY FOUNDATION**EIN:** 91-1663715**Software ID:** 13000170**Software Version:** 2013v3.1

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX PREPARATION	700	0	0	0

**TY 2013 Investments Corporate
Bonds Schedule****Name:** THE STOCKDALE FAMILY FOUNDATION**EIN:** 91-1663715**Software ID:** 13000170**Software Version:** 2013v3.1

Name of Bond	End of Year Book Value	End of Year Fair Market Value
10M WELLPOINT INC 5.25% 1/15/16	9,300	10,811
50M ONTARIO HYDRO CTF 0.00% 11/27/20	10,772	37,206
30M ONTARIO HYDRO GEN RES 0.00% 10/15/21	6,647	21,285
10M DOW CHEMCIAL 5.7% 05/15/18	2,818	3,429

TY 2013 Investments Corporate
Stock Schedule

Name: THE STOCKDALE FAMILY FOUNDATION
EIN: 91-1663715
Software ID: 13000170
Software Version: 2013v3.1

Name of Stock	End of Year Book Value	End of Year Fair Market Value
300 AGCO CORP	5,043	17,757
FIRSTSERVICE CORP 7% PFD		
100 PETRO CHINA COMPANY	13,899	10,974
WELLS FARGO CARRIED NO COST- AUXIER SCH	15,563	22,700
400 ALKERMES INC	4,872	12,198
17 AMERICAN INTERNATIONAL GP	541	868
100 ANDERSON INC	1,269	8,917
300 APOLLO GROUP	12,678	8,196
100 AUTOMATIC DATA PROCESSING	3,378	8,080
400 BANK OF NEW YORK	10,657	13,976
300 BOEING COMPANY	17,242	40,947
50 BRIDGEPOINT EDUCATION	788	886
400 CVS CARTEMARK	7,545	28,628
350 COCA-COLA COMPANY	15,093	28,917
100 COLUMBIA SPORTSWEAR	3,185	7,875
200 CONOCO PHILLIPS	5,558	14,130
400 COSTCO WHOLESALE CORP	12,427	47,608
348 COVENTRY HEALTH CARE INC		
400 CYPRESS SEMICONDUCTOR	442	4,200
350 DR PEPPER SNAPPLE GROUP	5,982	17,052
350 E I DU PONNT DENEMOURS	13,001	22,740
1844 FIRST SERVICE CORP	9,997	79,381
500 FRANKLIN RESOURCES INC	18,796	86,595
250 GLAXO SMITHKLINE PLC	16,309	18,687
300 GRANITE CONSTUCTION INC	1,411	1,749
500 H & R BLOCK	8,989	14,520
700 HEALTH MANAGEMENT ASSOC	4,843	9,170
400 HOME DEPOT INC	14,550	32,936
300 INGERSOLL RAND CO	8,531	18,480
600 KROGER CORP	12,647	23,718

Name of Stock	End of Year Book Value	End of Year Fair Market Value
220 LINCOLN EDUCATIONAL	2,806	1,096
400 LOWES CORP	12,605	19,820
200 MANPOWER INC	6,851	12,879
800 MARSH & MCLENNAN CO	20,157	33,852
400 MERCK & CO INC	22,234	20,020
300 MICROSOFT	8,583	11,223
400 NIKE INC CLASS B	8,397	31,456
400 PAYCHEX INC	9,784	18,212
400 PFIZER INC	10,654	12,252
100 PLUMB CREEK TIMBER	2,325	4,651
200 PRECISION CASTPARTS CORP	16,161	53,860
1800 TCP FINANCIAL CORP	37,446	29,250
580 THE TRAVELERS COMPANIES INC	22,646	52,513
300 UNILVEVER NV NEW YORK	7,142	12,069
500 UNITED HEALTH GROUP	15,496	30,120
250 UNIVERSAL TECHNICAL	4,937	3,478
650 UNUM CORP	7,191	19,294
600 VALERO ENERGY CORP	17,828	30,240
300 WEIGHT WATCHERS INTL. INC	12,543	13,172
400 WELLPOINT INC.	13,956	36,956
700 WILLBROS GROUP INC	4,361	6,594
500 ZIMMER HOLDINGS	28,900	46,595
800 SK TELECOM	4,002	4,924
963 OI SA PFD	7,648	1,531
1200 TESCO PLC ADR	26,472	20,208
800 CENTRAL PACIFIC FIN COMPANY	10,609	16,064
500 HOSPIRA INC	14,484	20,640
200 MEDTRONIC	7,655	11,478
300 MOLSON COORS	12,735	16,845
9 WARRENTS AIG GROUP	147	182

Name of Stock	End of Year Book Value	End of Year Fair Market Value
100 PHILLIPS 66	1,652	7,713
400 BP PLC	15,035	19,444
2000 WESTERN UNION CO	25,361	34,500
93 OI SA ADR	942	152
1100 TELEFONICA SA ADR	13,220	17,974
266 CST BRANDS	7,563	9,768
96 AETNA INC	5,634	6,585
100 ALLEGION PLC	2,126	4,419

TY 2013 Other Professional Fees Schedule**Name:** THE STOCKDALE FAMILY FOUNDATION**EIN:** 91-1663715**Software ID:** 13000170**Software Version:** 2013v3.1

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT FEES	12,133	12,133	0	0

TY 2013 Taxes Schedule**Name:** THE STOCKDALE FAMILY FOUNDATION**EIN:** 91-1663715**Software ID:** 13000170**Software Version:** 2013v3.1

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
2012 INCOME TAX PAID	315			
ADR FEES	180	180		
ANNUAL STATE REGISTRATION	35			
FOREIGN TAX WITHHELD ON DIVIDENDS	445	445		