



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

Form

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

Do not enter Social Security numbers on this form as it may be made public.  
Information about Form 990-PF and its separate instructions is at [www.irs.gov/form990pf](http://www.irs.gov/form990pf).

For calendar year 2013 or tax year beginning

, 2013, and ending

, 20

Name of foundation <b>The Wolf Family Charitable Foundation</b>		A Employer identification number <b>93-1263727</b>
Number and street (or P.O. box number if mail is not delivered to street address) <b>6331 NE 112th Ave</b>	Room/suite	B Telephone number (see instructions) <b>(503) 255-6450</b>
City or town, state or province, country, and ZIP or foreign postal code <b>Portland, OR 97220</b>		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply		D 1. Foreign organizations, check here <input type="checkbox"/>
<input type="checkbox"/> Initial return	<input type="checkbox"/> Initial return of a former public charity	2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
<input type="checkbox"/> Final return	<input type="checkbox"/> Amended return	E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
<input type="checkbox"/> Address change	<input type="checkbox"/> Name change	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation		
<input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		
I Fair market value of all assets at end of year (from Part II, col (c), line 16) <b>\$ 1,515,086</b>		
J Accounting method. <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____		
(Part I, column (d) must be on cash basis)		

**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)
1 Contributions, gifts, grants, etc., received (attach schedule)	32,400			
2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B				
3 Interest on savings and temporary cash investments				
4 Dividends and interest from securities	26,283	26,283	26,283	
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	7,790			
b Gross sales price for all assets on line 6a	242,256			
7 Capital gain net income (from Part IV, line 2)		7,790		
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)	13,396	13,396	13,396	
12 Total. Add lines 1 through 11	79,869	47,469	39,679	
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)	650	650	650	
c Other professional fees (attach schedule)	10,061	10,061	10,061	
17 Interest				
18 Taxes (attach schedule) (see instructions)	830	830	830	
19 Depreciation (attach schedule) and depletion				
20 Occupancy				
21 Travel, conferences, and meetings				
22 Printing and publications				
23 Other expenses (attach schedule)	50	50	50	
24 Total operating and administrative expenses.				
Add lines 13 through 23	11,591	11,591	11,591	0
25 Contributions, gifts, grants paid	84,475			84,475
26 Total expenses and disbursements. Add lines 24 and 25	96,066	11,591	11,591	84,475
27 Subtract line 26 from line 12:				
a Excess of revenue over expenses and disbursements	(16,197)			
b Net investment income (if negative, enter -0-)		35,878		
c Adjusted net income (if negative, enter -0-)			28,088	

For Paperwork Reduction Act Notice, see instructions.

Form 990-PF (2013)

EEA

6

**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
<b>Assets</b>	1 Cash - non-interest-bearing	30,873	14,155	14,155
	2 Savings and temporary cash investments			
	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)			
	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)	1,056,644	1,056,914	1,500,931	
14 Land, buildings, and equipment: basis				
Less: accumulated depreciation (attach schedule)				
15 Other assets (describe)				
16 <b>Total assets</b> (to be completed by all filers - see the instructions. Also, see page 1, item I)	1,087,517	1,071,069	1,515,086	
<b>Liabilities</b>	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 <b>Total liabilities</b> (add lines 17 through 22)	0	0	
<b>Net Assets or Fund Balances</b>	<b>Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.</b> <input checked="" type="checkbox"/>			
	24 Unrestricted	1,087,517	1,071,069	
	25 Temporarily restricted			
	26 Permanently restricted			
	<b>Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.</b> <input 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			
	30 <b>Total net assets or fund balances</b> (see instructions)	1,087,517	1,071,069	
	31 <b>Total liabilities and net assets/fund balances</b> (see instructions)	1,087,517	1,071,069	

**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	1,087,517
2 Enter amount from Part I, line 27a	2	(16,197)
3 Other increases not included in line 2 (itemize)	3	
4 Add lines 1, 2, and 3	4	1,071,320
5 Decreases not included in line 2 (itemize) <b>STM116</b>	5	251
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,071,069

**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 (yr, mo, day)	(d) Date sold (yr, mo, day)
<b>1a See STM-134</b>				
<b>b</b>				
<b>c</b>				
<b>d</b>				
<b>e</b>				
(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)	
<b>a</b> 242,256		234,466	7,790	
<b>b</b>				
<b>c</b>				
<b>d</b>				
<b>e</b>				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))	
<b>a</b>			7,790	
<b>b</b>				
<b>c</b>				
<b>d</b>				
<b>e</b>				
<b>2</b> 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 }			<b>2</b>	7,790
<b>3</b> 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 . . . . . }			<b>3</b>	(814)

**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	64,745	1,292,588	0.050089
2011	63,550	1,241,598	0.051184
2010	54,955	1,071,960	0.051266
2009	45,657	814,095	0.056083
2008	55,122	814,704	0.067659
<b>2</b> Total of line 1, column (d) . . . . .			<b>2</b> 0.276281
<b>3</b> 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 . . . . .			<b>3</b> 0.055256
<b>4</b> Enter the net value of noncharitable-use assets for 2013 from Part X, line 5 . . . . .			<b>4</b> 1,409,858
<b>5</b> Multiply line 4 by line 3 . . . . .			<b>5</b> 77,903
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b) . . . . .			<b>6</b> 359
<b>7</b> Add lines 5 and 6 . . . . .			<b>7</b> 78,262
<b>8</b> 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.			<b>8</b> 84,475

**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)			
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		1	359
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	359
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	359
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 type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		359
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11 Enter the amount of line 10 to be: Credited to 2014 estimated tax Refunded	11		

**Part VII-A Statements Regarding Activities**

	Yes	No
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?		X
b 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		X
c Did the foundation file Form 1120-POL for this year?		X
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		X
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		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
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?	X	
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	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) OR		
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	X	
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		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

**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		X
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		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	
Website address ▶ <u>N/A</u>				
14	The books are in care of ▶ <u>Teri L Sykes</u> Telephone no ▶ <u>503-255-6450</u>			
	Located at ▶ <u>6331 NE 112th Ave, Portland, OR</u> ZIP+4 ▶ <u>97220</u>			
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 the instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes," enter the name of the foreign country ▶			X

**Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required**

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

		Yes	No
1a	During the year did the foundation (either directly or indirectly):		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6)	Agree to pay money or property to a government official? (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 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 instructions)?	1b	
	Organizations relying on a current notice regarding disaster assistance check here ▶ <input type="checkbox"/>		
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	X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a	At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	If "Yes," list the years ▶ _____, _____, _____, _____		
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	X
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ _____, _____, _____, _____		
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.)	3b	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
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	X

**Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**

**5a** During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions) ☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

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

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

**c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ No

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

**6a** Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No

**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? ☐ **6b** X

If "Yes" to 6b, file Form 8870

**7a** At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No

**b** If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? ☐ **7b**

**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors****1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).**

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Elizabeth A Wolf 6331 NE 112th Ave, Portland, OR 97220	Director 0	0	0	0
Teri L Sykes 6331 NE 112th Ave, Portland, OR 97220	Director 0	0	0	0
Brian Wolf 6331 NE 112th Ave, Portland, OR 97220	Director 0	0	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 \$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 . . . . .		▶

**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	0
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	0
All other program-related investments See 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	1,416,662
b	Average of monthly cash balances	1b	14,666
c	Fair market value of all other assets (see instructions)	1c	0
d	<b>Total</b> (add lines 1a, b, and c)	1d	1,431,328
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	1,431,328
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	21,470
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,409,858
6	<b>Minimum investment return.</b> Enter 5% of line 5	6	70,493

**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	70,493
2a	Tax on investment income for 2013 from Part VI, line 5	2a	359
b	Income tax for 2013 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	359
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	70,134
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	70,134
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	70,134

**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	84,475
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	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	84,475
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	359
6	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	6	84,116

**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
<b>1</b> Distributable amount for 2013 from Part XI, line 7 . . . . .				<b>70,134</b>
<b>2</b> Undistributed income, if any, as of the end of 2013:				
<b>a</b> Enter amount for 2012 only . . . . .				
<b>b</b> Total for prior years. . . . .				
<b>3</b> Excess distributions carryover, if any, to 2013:				
<b>a</b> From 2008 . . . . . <b>14,791</b>				
<b>b</b> From 2009 . . . . . <b>5,305</b>				
<b>c</b> From 2010 . . . . . <b>1,769</b>				
<b>d</b> From 2011 . . . . . <b>2,140</b>				
<b>e</b> From 2012 . . . . . <b>792</b>				
<b>f</b> Total of lines 3a through e . . . . .	<b>24,797</b>			
<b>4</b> Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ <b>84,475</b>				
<b>a</b> Applied to 2012, but not more than line 2a . . .				
<b>b</b> Applied to undistributed income of prior years (Election required - see instructions) . . . . .				
<b>c</b> Treated as distributions out of corpus (Election required - see instructions) . . . . .				
<b>d</b> Applied to 2013 distributable amount . . . . .				<b>70,134</b>
<b>e</b> Remaining amount distributed out of corpus . . .	<b>14,341</b>			
<b>5</b> Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a) )				
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus Add lines 3f, 4c, and 4e. Subtract line 5 .	<b>39,138</b>			
<b>b</b> Prior years' undistributed income Subtract line 4b from line 2b . . . . .				
<b>c</b> 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 . . . . .				
<b>d</b> Subtract line 6c from line 6b Taxable amount - see instructions . . . . .				
<b>e</b> Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount - see instructions . . . . .				
<b>f</b> Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014 . . . . .				<b>0</b>
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions) . .				
<b>8</b> Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions) . . .	<b>14,791</b>			
<b>9</b> Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a . . . . .	<b>24,347</b>			
<b>10</b> Analysis of line 9				
<b>a</b> Excess from 2009 . . . . . <b>5,305</b>				
<b>b</b> Excess from 2010 . . . . . <b>1,769</b>				
<b>c</b> Excess from 2011 . . . . . <b>2,140</b>				
<b>d</b> Excess from 2012 . . . . . <b>792</b>				
<b>e</b> Excess from 2013 . . . . . <b>14,341</b>				



**Part XV** Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	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
<b>a</b> Paid during the year				
Washington State University 14024 NE Salmon Creek Ave Vancouver, WA 98686	none		Charit donat orgs purp home sch underpriv	2,000
Archdiocese for the Military Serv PO Box 4469 Washington, DC 20017	none		Chait donations to priests religious asst	500
Standupgirl.com Foundation 4335 River Road North Salem, OR 97303	none		Char contr for org pur edu expectant mothers	3,000
Archdiocese of Portland in Oregon PO Box 15149 Portland, OR 97293	none		Char donation to orgs religious purpose	500
St Vincent De Paul 5120 SE Milwaukie Ave Portland, OR 97202	none		Charit donation orgs religious pur help needy	3,000
Christian Found for Children, Aging PO Box 805105 Kansas City, MO 64180-5105	none		Char donat to orgs purpose aid children and aged	3,000
Edward Spanner 546 Oats Woodburn, OR 97071	none		Assist local family cost of prescrip drugs	500
American Life League PO Box 1350 Stafford, VA 22555	none		Charit donat to orgs purpose to promote prolife	100
<b>Total</b> .....			<b>3a</b>	
<b>b</b> Approved for future payment				
<b>Total</b> .....			<b>3b</b>	

**Part XV** Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	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
<b>a</b> Paid during the year				
Eternal Perspective Ministries 39085 Pioneer Blvd Sandy, OR 97055	none		Charit donat to orgs religious purpose	500
Faith In Practice 7210 SW Sharon Lane Portland, OR 97225	none		Charit donat to orgs pur support catholic educat	150
Friends of San Lucas 4679 Cambridge Drive Saint Paul, MN 55122-2710	none		Charit donat to orgs religious purpose	500
Bethany Christian Services P.O. Box 294 Grand Rapids, MI 49501-0294	none		Charit donat to orgs purpose help abused children	500
Friends of the Grotto PO Box 20008 Portland, OR 97294-0008	none		Charit donat to orgs purpose to help refugees	1,500
Blanchet House P.O. Box 4145 Portland, OR 97208-4145	none		Charit donat to orgs purpose feed homeless	500
Generation Life Mission Fund 590 Snyder Ave West Chester, PA 19382	none		Charit donat to orgs religious purpose	500
Intl Theological Institute 6625 Hwy 53 E, ste 410 Dawsonville, GA 30534-8079	none		Charit donat to orgs religious purpose	1,000
<b>Total</b> .....			<b>3a</b>	
<b>b</b> Approved for future payment				
<b>Total</b> .....			<b>3b</b>	

Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions )
(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
		14	26,283	
		14	13,384	
		18	7,790	
			47,457	
			47,457	47,457

Form 990-PF (2013)



**Schedule B**  
(Form 990, 990-EZ,  
or 990-PF)

Department of the Treasury  
Internal Revenue Service

**Schedule of Contributors**

OMB No 1545-0047

**2013**

▶ **Attach to Form 990, Form 990-EZ, or Form 990-PF.**

▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

**Name of the organization**

**The Wolf Family Charitable Foundation**

**Employer identification number**

**93-1263727**

**Organization type (check one)**

**Filers of:**

**Section:**

Form 990 or 990-EZ

- ☐ 501(c)( ) (enter number) organization
- ☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
- ☐ 527 political organization

Form 990-PF

- ☒ 501(c)(3) exempt private foundation
- ☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
- ☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

**Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

**General Rule**

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II.

**Special Rules**

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 for use exclusively for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use exclusively for religious, charitable, etc., purposes, but these contributions did not total to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an exclusively religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year. . . . . ▶ \$ \_\_\_\_\_

**Caution.** An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).



Name of organization

Employer identification number

**The Wolf Family Charitable Foundation**

93-1263727

## Part I

**Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	Dennis & Teri Sykes  12126 SE Nella Way  Clackamas, OR 97015	\$ 20,000	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
2	Brian & Barbara Wolf  571 NW Alpine Terrace  Portland, OR 97210	\$ 10,000	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

**Part XV** Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	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
<b>a</b> Paid during the year				
Catholic Broadcasting NW PO Box 5888 Portland, OR 97228-5888	none		Charit donat to orgs purpose religious	5,000
NOM Education Fund 2029 K Street NW, ste 300 Washington, DC 20006	none		Charit donat to orgs purpose education	5,000
Northwest Family Services 6200 SE King Rd Portland, OR 97222	none		Charit donat to orgs purpose support needy	2,500
Child Fund International PO Box 26511 Richmond, VA 23286-8818	none		Charit donat to orgs purpose child welfare	500
Our Lady of Guadalupe Seminary 7880 West Denton Rd Denton, NE 68339	none		Charit donat to orgs relig pur supp Catholic	5,000
Clackamas Women's Services 704 Main Street Oregon City, OR 97045	none		Charit donat to orgs purpose asst victms dom viole	100
Clean Water for Haiti 4606 NW Grant Place Vancouver, WA 98663	none		Charit donat to orgs purpose	5,000
Crossroads Frm Coast to Capita P.O. Box 2219 Columbia, MD 21045	none		Charit donat to orgs purpose prolife	100
<b>Total</b> .....			<b>3a</b>	
<b>b</b> Approved for future payment				
<b>Total</b> .....			<b>3b</b>	

**Part XV** Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	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
<b>a</b> Paid during the year				
De LaSalle North Catholic HSch 1130 Winton Dr Concord, CA 94518	none		Charit donat to orgs religious and edu purpose	500
Dominican Sch Philosophy Theol 2301 Vine St Berkeley, CA 94701	none		Charit donat to orgs purpose promote relig	1,000
EcoViva 1904 Franklin St., Suite 902 Oakland, CA 94612	none		Char donat to orgs purpose supp needy of Cntrl	500
Feeding America PO Box 96749 Washington, DC 20077-7746	none		Charit donat to orgs purpose feed needy people	500
FINCA 1101 14th St NW # 11 Washington, DC 20005	none		Charit donat to orgs purpose loans poor to	500
Ryan & Jocelyn Mainard 17400 S Carlson Rd Oregon City, OR 97045	none		Charit donat to assist needy local family	500
FOCUS P.O. Box 18710 Golden, CO 80402	none		Charit donat to orgs religious purpose help	500
Salisa Bana PO Box 1027 Clackamas, OR 97015	none		Charit donat to orgs purpose supp needy children	1,000
<b>Total</b> .....			<b>3a</b>	
<b>b</b> Approved for future payment				
<b>Total</b> .....			<b>3b</b>	

**Part XV** Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	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
<b>a</b> Paid during the year				
St Alexander Catholic Church P.O. Box 644 Cornelius, OR 97113	none		Charit donat to orgs religious purpose	1,000
Hands Together P.O. Box 80985 Springfield, MA 01138	none		Charit donat to orgs purpose aid to needy	500
St Martins University 5000 Abey Way SE Lacey, WA 98503	none		Charit donat to orgs religious purpose	5,000
Holy Rosary Church 375 NE Clackamas St Portland, OR 97232	none		Charit donat to orgs religious purp help youth	5,000
St Mary Catholic Church 1716 NW Davis St Portland, OR 97209	none		Charit donat to orgs religious purpose	500
Knights of Columbus 1 Columbia Plaza New Haven, CT 06510	none		Charit donat to orgs religious purpose	3,200
St Thomas More Church 3525 SW Patton Rd Portland, OR 97221	none		Charit donat to orgs religous purpose	500
The Abbey Foundation of Oregon P.O. Box 501 Saint Benedict, OR 97373-0501	none		Charit donat to orgs religious purpose	1,500
<b>Total</b> .....			<b>3a</b>	
<b>b</b> Approved for future payment				
<b>Total</b> .....			<b>3b</b>	

**Part XV** Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	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
<b>a</b> Paid during the year				
The Laboure Society 1365 Corporate Center Curve Saint Paul, MN 55121	none		Charit donat to orgs relig purp supp priesthood	200
Martha & Mary Ministries 4303 SE Henderson St Portland, OR 97206	none		Charit donat to orgs relig purp end of life	1,000
Mary Foundation Po Box 26101 Cleveland, OH 44126	none		Charit donat to orgs religious purpose	100
Mary Mother of God Mission Soc 1736 Milestone Circle Modesto, CA 95357	none		Charit donat to orgs religious purpose	1,000
St Luke Productions PO Box 761 Beaverton, OR 97075-9980	none		Charit donat orgs pur support Catholic film	2,500
Open Arms & Helping Hands PO Box 1027 Clackamas, OR 97015	none		Charit donat to orgs religious purpose	1,000
St John Bosco High School 10327 River Rd N Salem, OR 97303	None		Charit donat orgs pur support Catholic	500
Oregon Food Bank P.O. Box 55370 Portland, OR 97238-5370	none		Charit donat to orgs purpose food for needy	1,000
<b>Total</b> .....			<b>3a</b>	
<b>b</b> Approved for future payment				
<b>Total</b> .....			<b>3b</b>	

**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				
Oregon Right To Life Edu Fdn 4335 River Road North Salem, OR 97303	none		Charit donat to orgs purpose promote prolife	2,725
Our Lady of Peace Retreat Hous 3600 SW 170th Ave Beaverton, OR 97006	none		Charit donat to orgs religious purpose retreat	10,000
Project Aurora PO Box 193 Cottage Grove, OR 97424	none		Charit donat orgs pur promote moral law education	500
Priests for Life PO Box 141172 Staten Island, NY 10314-9920	none		Charit donat to orgs religious purpose	500
Portland Rescue Mission P.O. Box 3713 Portland, OR 97208-3713	none		Charit donat to orgs purpose feed local homeless	200
Saint Child 2850 SW Cedar Hills Blvd 55 Beaverton, OR 97005-1354	none		Charit donat to orgs pupose sup pregnant yng	100
Total . . . . . ▶ 3a				84,475
b Approved for future payment				
Total . . . . . ▶ 3b				

**Federal Supporting Statements****2013 PG 01**

Name(s) as shown on return

FEIN

The Wolf Family Charitable Foundation

93-1263727

**Form 990PF, Part III, Line 5  
Other Decreases Schedule**

Statement #116

Prior Period Adjustment 251Total 251**Form 990PF, Part II, Line 13  
Investments: Other Schedule****PG 01**

Statement #118

<u>Category</u>	<u>Book value (BOY)</u>	<u>Book value (EOY)</u>	<u>FMV (EOY)</u>
Charles Schwab	<u>1,056,644</u>	<u>1,056,914</u>	<u>1,500,931</u>
Total	<u><u>1,056,644</u></u>	<u><u>1,056,914</u></u>	<u><u>1,500,931</u></u>

# Federal Supporting Statements

2013 PG 01

Your Social Security Number  
93-1263727

Name(s) as shown on return

The Wolf Family Charitable Foundation

## Form 990PF, Part I, Line 23 - Other Expenses Schedule

Statement #103

Description	Revenue and expenses	Net investment	Adjusted net income	Charitable purpose
Licenses	50	50	50	0
Totals	50	50	50	0

PG 01

Statement #106

## Form 990PF, Part I, Line 11 - Other Income Schedule

Description	Revenue and expenses	Net investment	Adjusted net income
Capital Gain Distribution	13,384	13,384	13,384
Miscellaneous Income	12	12	12
Totals	13,396	13,396	13,396



# Federal Supporting Statements

2013 PG 01

Your Social Security Number  
93-1263727

Name(s) as shown on return

The Wolf Family Charitable Foundation

Statement #108

## Form 990PF, Part I, Line 16(b) - Accounting Fees Schedule

Description	Revenue and expenses	Net investment	Adjusted net income	Charitable purpose
Accounting Fees	650	650	650	0
Totals	650	650	650	0

PG 01

Statement #109

## Form 990PF, Part I, Line 16(c) - Other Professional Fees Schedule

Description	Revenue and expenses	Net investment	Adjusted net income	Charitable purpose
Professional Fees	10,061	10,061	10,061	0
Totals	10,061	10,061	10,061	0

# Federal Supporting Statements

2013 PG 01

Name(s) as shown on return

Your Social Security Number

The Wolf Family Charitable Foundation

93-1263727

Form 990PF, Part I, Line 18 - Taxes Schedule

Statement #110

Description	Revenue and expenses	Net investment	Adjusted net income	Charitable purpose
Federal Taxes	676	676	676	0
Oregon Tax	154	154	154	0
Totals	830	830	830	0

Form 990-PF, Part IV, Capital Gains And Losses Information (Overflow)

PG 01

Statement #134

Description	P-Purchase	D-Donation	Date Acquired	Date Sold	Sales Price	Depreciation	Cost or other basis	Gain or Loss	Gains Minus Excess or Losses
Vanguard REIT VNQ	P		2008-04-16	2013-04-16	16,903		14,610	2,293	2,293
DFA US Sm Cap Val Ptlld Instl DFXVF	P		2008-06-15	2013-06-24	20,000		19,929	71	71
Vanguard Intl Eqty EFT Gbl VNI	P		2011-03-02	2013-07-19	20,450		18,826	1,624	1,624
Vanguard Intern Term VFIUX	P		2013-04-19	2013-09-19	19,211		20,025	(814)	(814)
Vanguard Intern Term VFIUX	P		2008-06-15	2013-09-19	145,641		148,130	(2,489)	(2,489)
Vanguard Value VTV	P		2011-10-05	2013-10-25	20,051		12,946	7,105	7,105
Total					242,256		234,466	7,790	7,790