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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 separate instructions is at www.irs.gov/form990pf.

2013

Open to Public Inspection

For calendar year 2013 or tax year beginning

, and ending

Name of foundation JUBITZ FAMILY FOUNDATION		A Employer identification number 93-1324016
Number and street (or P.O. box number if mail is not delivered to street address) 221 N.W. SECOND AVENUE	Room/suite 204	B Telephone number (503) 274-6255
City or town, state or province, country, and ZIP or foreign postal code PORTLAND, OR 97209		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) \$ 13,232,868.	J Accounting method: ☐ Cash ☒ Accrual ☐ Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(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		170,000.		N/A	
2 Check ☐ if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments		397.	397.		STATEMENT 1
4 Dividends and interest from securities		233,568.	233,568.		STATEMENT 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		310,580.			
b Gross sales price for all assets on line 6a 3,556,433.					
7 Capital gain net income (from Part IV, line 2)			310,580.		
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)					
11 Other income		5,000.	0.		STATEMENT 3
12 Total. Add lines 1 through 11		719,545.	544,545.		
13 Compensation of officers, directors, trustees, etc.		93,250.	18,637.		74,549.
14 Other employee salaries and wages		62,000.	11,838.		47,351.
15 Pension plans, employee benefits		8,875.	1,775.		7,100.
16a Legal fees					
b Accounting fees STMT 4		3,015.	0.		3,015.
c Other professional fees STMT 5		119,831.	51,776.		60,209.
17 Interest					
18 Taxes		22,979.	2,642.		10,571.
19 Depreciation and depletion					
20 Occupancy		9,950.	1,836.		7,344.
21 Travel, conferences, and meetings		38,134.	6,443.		25,774.
22 Printing and publications		2,746.	500.		1,998.
23 Other expenses		23,494.	2,910.		20,584.
24 Total operating and administrative expenses. Add lines 13 through 23		384,274.	98,357.		258,495.
25 Contributions, gifts, grants paid		563,485.			594,185.
26 Total expenses and disbursements. Add lines 24 and 25		947,759.	98,357.		852,680.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		-228,214.			
b Net investment income (if negative, enter -0-)			446,188.		
c Adjusted net income (if negative, enter -0-)				N/A	

Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	580,158.	605,722.	605,722.
	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			
	7 Other notes and loans receivable ▶			
	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			
	b Investments - corporate stock STMT 9	5,250,528.	6,102,445.	6,102,445.
	c Investments - corporate bonds STMT 10	3,988,742.	2,063,302.	2,063,302.
	11 Investments - land, buildings, and equipment basis ▶			
Liabilities	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other STMT 11	2,775,288.	4,461,399.	4,461,399.
	14 Land, buildings, and equipment; basis ▶			
	Less accumulated depreciation ▶			
	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item 1)	12,594,716.	13,232,868.	13,232,868.
	17 Accounts payable and accrued expenses	4,324.	21,979.	
	18 Grants payable	30,700.		
	19 Deferred revenue			
Net Assets or Fund Balances	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	35,024.	21,979.	
	Foundations that follow SFAS 117, check here ▶ ☒ and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted	12,559,692.	13,210,889.	
	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			
Net Assets or Fund Balances	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	12,559,692.	13,210,889.	
	31 Total liabilities and net assets/fund balances	12,594,716.	13,232,868.	

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	12,559,692.
2 Enter amount from Part I, line 27a	2	-228,214.
3 Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 8	3	879,411.
4 Add lines 1, 2, and 3	4	13,210,889.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	13,210,889.

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 PUBLICLY TRADED SECURITIES				
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 3,556,433.		3,245,853.	310,580.
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			310,580.
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	310,580.
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). If (loss), enter -0- in Part I, line 8		3	N/A

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	667,427.	12,154,136.	.054914
2011	688,089.	12,608,342.	.054574
2010	689,298.	12,215,005.	.056430
2009	660,766.	11,247,031.	.058750
2008	965,806.	13,503,373.	.071523

2 Total of line 1, column (d)	2	.296191
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	.059238
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	12,396,180.
5 Multiply line 4 by line 3	5	734,325.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	4,462.
7 Add lines 5 and 6	7	738,787.
8 Enter qualifying distributions from Part XII, line 4	8	852,680.

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 ☐ 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	4,462.
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	4,462.
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	4,462.
6 Credits/Payments:			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	4,134.	
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	4,134.	
8 Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached	8	31.	
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. \$ 0. (2) On foundation managers. \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 0.		
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

N/A

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? Website address WWW.JUBITZFF.ORG	13	X	
14	The books are in care of THE FOUNDATION Telephone no. (503) 274-6255 Located at 221 N.W. SECOND AVENUE, SUITE 204, PORTLAND, OR ZIP+4 97209			
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	N/A	
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	Yes	No
				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?	☐ Yes ☒ No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☒ Yes ☐ No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	☐ Yes ☒ No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here	1b	X
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? If "Yes," list the years	☐ Yes ☒ No	
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.)	N/A	2b
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☒ No	
b If "Yes," did it have excess business holdings in 2013 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013)	N/A	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)?

☒ 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)?

Organizations relying on a current notice regarding disaster assistance check here

☐

5b

X

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?

SEE STATEMENT 13

☒ 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

6b

X

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

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?

N/A

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.

(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 STATEMENT 12		93,250.	6,036.	0.

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services

0

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1	
SEE STATEMENT 14	85,323.
2	
SEE STATEMENT 15	75,155.
3	
4	

Part IX-B Summary of Program-Related Investments

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	0.

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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	11,948,496.
b Average of monthly cash balances	1b	636,458.
c Fair market value of all other assets	1c	
d Total (add lines 1a, b, and c)	1d	12,584,954.
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	12,584,954.
4 Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	188,774.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	12,396,180.
6 Minimum investment return. Enter 5% of line 5	6	619,809.

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	619,809.
2a Tax on investment income for 2013 from Part VI, line 5	2a	4,462.
b Income tax for 2013. (This does not include the tax from Part VI.)	2b	
c Add lines 2a and 2b	2c	4,462.
3 Distributable amount before adjustments. Subtract line 2c from line 1	3	615,347.
4 Recoveries of amounts treated as qualifying distributions	4	5,000.
5 Add lines 3 and 4	5	620,347.
6 Deduction from distributable amount (see instructions)	6	0.
7 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	620,347.

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	852,680.
b Program-related investments - total from Part IX-B	1b	0.
2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3 Amounts set aside for specific charitable projects that satisfy the:		
a Suitability test (prior IRS approval required)	3a	
b Cash distribution test (attach the required schedule)	3b	
4 Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	852,680.
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	5	4,462.
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6	848,218.

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				620,347.
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2013:				
a From 2008	303,375.			
b From 2009	104,089.			
c From 2010	85,158.			
d From 2011	63,206.			
e From 2012	55,229.			
f Total of lines 3a through e	611,057.			
4 Qualifying distributions for 2013 from Part XII, line 4: ► \$	852,680.			
a Applied to 2012, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2013 distributable amount				620,347.
e Remaining amount distributed out of corpus	232,333.			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:	843,390.			
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5				
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2012. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2013. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2014				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7	303,375.			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	540,015.			
10 Analysis of line 9:				
a Excess from 2009	104,089.			
b Excess from 2010	85,158.			
c Excess from 2011	63,206.			
d Excess from 2012	55,229.			
e Excess from 2013	232,333.			

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
a Paid during the year				
BAKER COUNTY CASA BAKER CITY, OR	NONE	PC	GENERAL OPERATIONS	5,000.
BARK PORTLAND, OR	NONE	PC	GENERAL OPERATIONS	6,000.
BETHEL UCC WHITE SALMON, WA	NONE	PC	GENERAL OPERATIONS	5,000.
BOYS & GIRLS CLUBS OF CENTRAL OREGON BEND, OR	NONE	PC	GENERAL OPERATIONS	4,000.
BOYS AND GIRLS CLUB OF PORTLAND PORTLAND, OR	NONE	PC	GENERAL OPERATIONS	5,000.
Total	SEE CONTINUATION SHEET(S)			594,185.
b Approved for future payment				
NONE				
Total				0.

Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

		Yes	No
1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a Transfers from the reporting foundation to a noncharitable exempt organization of:			
(1) Cash	1a(1)		X
(2) Other assets	1a(2)		X
b Other transactions:			
(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
(3) Rental of facilities, equipment, or other assets	1b(3)		X
(4) Reimbursement arrangements	1b(4)		X
(5) Loans or loan guarantees	1b(5)		X
(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees		1c	X
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.			

[illegible]

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		

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.

Sign Here  

Signature of officer or trustee Date 6/10/14 Title President

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

Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
	GARY MCGEE		6/24/14		
	Firm's name ▶ GARY MCGEE & CO. LLP			Firm's EIN ▶	
	Firm's address ▶ 808 S.W. THIRD AVENUE, SUITE 700 PORTLAND, OR 97204			Phone no. (503) 222-2515	

Schedule B(Form 990, 990-EZ,
or 990-PF)Department of the Treasury
Internal Revenue Service**Schedule of Contributors**

▶ 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.

OMB No 1545-0047

2013

Name of the organization

Employer identification number

JUBITZ FAMILY FOUNDATION

93-1324016

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 foundationCheck 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).

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2013)

Name of organization	Employer identification number
JUBITZ FAMILY FOUNDATION	93-1324016

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	M. ALBIN JUBITZ, JR. 221 N.W. SECOND AVENUE, SUITE 210 PORTLAND, OR 97209	\$ 170,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)

Employer identification number

93-1324016

Part II Noncash Property (see instructions). Use duplicate copies of Part II if additional space is needed

[illegible]

Name of organization

Employer identification number

JUBITZ FAMILY FOUNDATION**93-1324016****Part III**

Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total more than \$1,000 for the year. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once) ▶ \$

Use duplicate copies of Part III if additional space is needed

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

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
BRADLEY ANGLE PORTLAND, OR	NONE	PC	GENERAL OPERATIONS	2,500.
BRIDGE MEADOWS PORTLAND, OR	NONE	PC	GENERAL OPERATIONS	6,000.
CALAPOOIA WATERSHED BROWNSVILLE, OR	NONE	PC	GENERAL OPERATIONS	3,000.
CAMP FIRE COLUMBIA PORTLAND, OR	NONE	PC	GENERAL OPERATIONS	2,500.
CANBY SCHOOL DISTRICT CANBY, OR	NONE	PC	GENERAL OPERATIONS	5,000.
CASA FOR CHILDREN PORTLAND, OR	NONE	PC	GENERAL OPERATIONS	7,500.
CEASEFIRE OREGON FOUNDATION PORTLAND, OR	NONE	PC	GENERAL OPERATIONS	2,000.
CENTER FOR ENVIRONMENTAL EQUITY PORTLAND, OR	NONE	PC	GENERAL OPERATIONS	3,500.
CENTER FOR ENVIRONMENTAL EQUITY PORTLAND, OR	NONE	PC	GENERAL OPERATIONS	3,200.
CHEHALEM YOUTH AND FAMILY SERVICES NEWBERG, OR	NONE	PC	GENERAL OPERATIONS	5,000.
Total from continuation sheets				569,185.

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

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
CHILDREN FIRST FOR OREGON PORTLAND, OR	NONE	PC	GENERAL OPERATIONS	2,500.
CHILDREN'S INSTITUTE PORTLAND, OR	NONE	PC	GENERAL OPERATIONS	5,000.
CHILDREN'S MUSEUM OF EASTERN OREGON PENDELTON, OR	NONE	PC	GENERAL OPERATIONS	3,000.
CLACKAMAS WOMEN'S SERVICES CLACKAMAS, OR	NONE	PC	GENERAL OPERATIONS	2,500.
CLIMATE SOLUTIONS SEATTLE, WA	NONE	PC	GENERAL OPERATIONS	5,000.
COLUMBIA RIVERKEEPER HOOD RIVER, OR	NONE	PC	GENERAL OPERATIONS	15,000.
COLUMBIA SLOUGH WATERSHED COUNCIL PORTLAND, OR	NONE	PC	GENERAL OPERATIONS	3,000.
COMMUNITY MEDIATION SERVICES EUGENE, OR	NONE	PC	GENERAL OPERATIONS	2,500.
COMMUNITY TRANSITIONAL SCHOOL PORTLAND, OR	NONE	PC	GENERAL OPERATIONS	5,000.
COOS-DOUGLAS NEIGHBOR TO NEIGHBOR NORTH BEND, OR	NONE	PC	GENERAL OPERATIONS	2,000.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

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
CRAG LAW CENTER PORTLAND, OR	NONE	PC	GENERAL OPERATIONS	5,000.
EPIPHANY SCHOOL DORCHESTER, MA	NONE	PC	GENERAL OPERATIONS	5,000.
FAMILIES & COMMUNITIES TOGETHER LA PINE, OR	NONE	PC	GENERAL OPERATIONS	2,500.
FAMILIES FIRST PARENT RESOURCE CENTER JOHN DAY, OR	NONE	PC	GENERAL OPERATIONS	3,000.
FAMILY BUILDING BLOCKS SALEM, OR	NONE	PC	GENERAL OPERATIONS	2,500.
FOUNDATIONS FOR A BETTER OREGON PORTLAND, OR	NONE	PC	GENERAL OPERATIONS	5,000.
FRIENDS OF BUFORD PARK & MT. PISGAH EUGENE, OR	NONE	PC	GENERAL OPERATIONS	5,000.
FRIENDS OF SOUTH SLOUGH CHARLESTON, OR	NONE	PC	GENERAL OPERATIONS	3,000.
FRIENDS OF THE COLUMBIA GORGE PORTLAND, OR	NONE	PC	GENERAL OPERATIONS	7,500.
FRIENDS OF TREES PORTLAND, OR	NONE	PC	GENERAL OPERATIONS	3,000.
Total from continuation sheets				

Part XV **Supplementary Information****3 Grants and Contributions Paid During the Year (Continuation)**

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
GLOBAL ZERO WASHINGTON, DC	NONE	PC	GENERAL OPERATIONS	7,500.
HEART OF OREGON CORPS BEND, OR	NONE	PC	GENERAL OPERATIONS	10,000.
HELLS CANYON PRES. COUNCIL LA GRANDE, OR	NONE	PC	GENERAL OPERATIONS	5,000.
HIGH DESERT MUSEUM BEND, OR	NONE	PC	GENERAL OPERATIONS	2,500.
IMPACT NORTHWEST PORTLAND, OR	NONE	PC	GENERAL OPERATIONS	10,000.
INSTITUTE FOR APPLIED ECOLOGY CORVALLIS, OR	NONE	PC	GENERAL OPERATIONS	8,965.
INSTITUTE FOR MULTI-TRACK DIPLOMACY ARLINGTON, VA	NONE	PC	GENERAL OPERATIONS	10,000.
JOHNSON CREEK WATERSHED COUNCIL MILWAUKIE, OR	NONE	PC	GENERAL OPERATIONS	5,000.
KIDS INTERVENTION & DIAGNOSTIC SERVICE CT BEND, OR	NONE	PC	GENERAL OPERATIONS	5,000.
KLAMATH BASIN RANGELAND TRUST KLAMATH FALLS, OR	NONE	PC	GENERAL OPERATIONS	10,000.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

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
KLAMATH LAKE LAND TRUST KLAMATH FALLS, OR	NONE	PC	GENERAL OPERATIONS	5,000.
KS WILD ASHLAND, OR	NONE	PC	GENERAL OPERATIONS	5,000.
LINNTON COMMUNITY CENTER PORTLAND, OR	NONE	PC	GENERAL OPERATIONS	3,000.
MASLOW PROJECT MEDFORD, OR	NONE	PC	GENERAL OPERATIONS	10,000.
MATTHEWS OPERA HOUSE & ARTS CENTER SPEARFISH, SD	NONE	PC	GENERAL OPERATIONS	6,500.
MEDIATORS BEYOND BORDERS CORVALLIS, OR	NONE	PC	GENERAL OPERATIONS	1,500.
MORRISON CHILD & FAMILY SERVICES PORTLAND, OR	NONE	PC	GENERAL OPERATIONS	10,000.
MOUNTAIN STAR FAMILY RELIEF NURSERY BEND, OR	NONE	PC	GENERAL OPERATIONS	2,500.
NATIVE FISH SOCIETY OREGON CITY, OR	NONE	PC	GENERAL OPERATIONS	10,000.
NOBEL PEACE LAUREATE PROJECT EUGENE, OR	NONE	PC	GENERAL OPERATIONS	5,000.
Total from continuation sheets				

Part XV Supplementary Information**3** Grants and Contributions Paid During the Year (Continuation)

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
NORTHWEST EARTH INSTITUTE PORTLAND, OR	NONE	PC	GENERAL OPERATIONS	25,000.
NORTHWEST OUTWARD BOUND SCHOOL TROUTDALE, OR	NONE	PC	GENERAL OPERATIONS	10,000.
OLD MILL CENTER FOR CHILDREN & FAMILIES CORVALLIS, OR	NONE	PC	GENERAL OPERATIONS	2,500.
OPEN MEADOW ALTERNATIVE SCHOOL PORTLAND, OR	NONE	PC	GENERAL OPERATIONS	7,500.
OR PHYSICIANS FOR SOCIAL RESPONSIBILITY PORTLAND, OR	NONE	PC	GENERAL OPERATIONS	5,000.
OREGON ENVIRONMENTAL COUNCIL PORTLAND, OR	NONE	PC	GENERAL OPERATIONS	10,000.
OREGON NATURAL DESERT ASSOCIATION BEND, OR	NONE	PC	GENERAL OPERATIONS	7,500.
OREGON WILD PORTLAND, OR	NONE	PC	GENERAL OPERATIONS	12,500.
PACIFIC CREST TRAIL ASSOCIATION SACRAMENTO, CA	NONE	PC	GENERAL OPERATIONS	3,000.
PACIFIC RIVERS COUNCIL PORTLAND, OR	NONE	PC	GENERAL OPERATIONS	4,000.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

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
PARENTING NOW EUGENE, OR	NONE	PC	GENERAL OPERATIONS	5,000.
PEACEVOICE PORTLAND, OR	NONE	PC	GENERAL OPERATIONS	20,000.
PLAYWORKS PORTLAND PORTLAND, OR	NONE	PC	GENERAL OPERATIONS	2,500.
PORTLAND CHILDREN'S MUSEUM PORTLAND, OR	NONE	PC	GENERAL OPERATIONS	7,500.
PORTLAND OIC PORTLAND, OR	NONE	PC	GENERAL OPERATIONS	3,000.
PORTLAND STATE UNIVERSITY FOUNDATION PORTLAND, OR	NONE	PC	GENERAL OPERATIONS	10,000.
PORTLAND STATE UNIVERSITY PORTLAND, OR	NONE	PC	GENERAL OPERATIONS	15,000.
PORTLAND STATE UNIVERSITY PORTLAND, OR	NONE	PC	GENERAL OPERATIONS	12,500.
PROJECT ACCESS NOW PORTLAND, OR	NONE	PC	GENERAL OPERATIONS	8,000.
RIDDLE SCHOOL DIST. 70 RIDDLE, OR	NONE	PC	GENERAL OPERATIONS	4,000.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

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
ROTARY INTERNATIONAL DISTRICT 5100 WILSONVILLE, OR	NONE	PC	GENERAL OPERATIONS	5,000.
SANDY RIVER BASIN WATERSHED COUNCIL SANDY, OR	NONE	PC	GENERAL OPERATIONS	5,000.
SAVING GRACE BEND, OR	NONE	PC	GENERAL OPERATIONS	5,000.
SEASHORE FAMILY LITERACY WALDPOR, OR	NONE	PC	GENERAL OPERATIONS	2,500.
SMART PORTLAND, OR	NONE	PC	GENERAL OPERATIONS	8,000.
SOLV PORTLAND, OR	NONE	PC	GENERAL OPERATIONS	5,000.
SPEARFISH FOUNDATION PUBLIC ED SPEARFISH, SD	NONE	PC	GENERAL OPERATIONS	10,000.
STREAM RESTORATION ALLIANCE OF MIDDLE ROGUE GRANTS PASS, OR	NONE	PC	GENERAL OPERATIONS	5,000.
SYNESI LLC LAKE OSWEGO, OR	NONE	NC	GENERAL OPERATIONS	20,020.
THE CHILDREN'S BOOK BANK PORTLAND, OR	NONE	PC	GENERAL OPERATIONS	2,500.
Total from continuation sheets				

Part XV Supplementary Information**3** Grants and Contributions Paid During the Year (Continuation)

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
THE WETLANDS CONSERVANCY PORTLAND, OR	NONE	PC	GENERAL OPERATIONS	5,000.
TILLAMOOK BAY CHILD CARE CENTER TILLAMOOK, OR	NONE	PC	GENERAL OPERATIONS	2,500.
TILLAMOOK ESTUARIES PARTNERSHIP GARIBALDI, OR	NONE	PC	GENERAL OPERATIONS	3,000.
TREASURE VALLEY RELIEF NURSERY ONTARIO, OR	NONE	PC	GENERAL OPERATIONS	2,500.
TROUT UNLIMITED ARLINGTON, VA	NONE	PC	GENERAL OPERATIONS	5,000.
VOLUNTEERS OF AMERICA PORTLAND, OR	NONE	PC	GENERAL OPERATIONS	5,000.
WATERWATCH OF OREGON PORTLAND, OR	NONE	PC	GENERAL OPERATIONS	7,500.
WESTERN ENVIRONMENTAL LAW CENTER EUGENE, OR	NONE	PC	GENERAL OPERATIONS	7,500.
WHOLISTIC PEACE INSTITUTE PORTLAND, OR	NONE	PC	GENERAL OPERATIONS	20,000.
WONDERWORKS CHILDRENS MUSEUM THE DALLES, OR	NONE	PC	GENERAL OPERATIONS	4,000.
Total from continuation sheets				

93-1324016

3 Grants and Contributions Paid During the Year (Continuation)**Total from continuation sheets**

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
CD INTEREST - ALBINA COMMUNITY BANK	370.	370.	
CHECKING INTEREST - ALBINA COMMUNITY BANK	27.	27.	
TOTAL TO PART I, LINE 3	397.	397.	

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
DIVIDEND INCOME - U.S. TRUST	15,742.	0.	15,742.	15,742.	
INTEREST INCOME - U.S. TRUST	217,826.	0.	217,826.	217,826.	
TO PART I, LINE 4	233,568.	0.	233,568.	233,568.	

FORM 990-PF OTHER INCOME STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
REFUND OF GRANTS AWARDED	5,000.	0.	
TOTAL TO FORM 990-PF, PART I, LINE 11	5,000.	0.	

FORM 990-PF	ACCOUNTING FEES			STATEMENT 4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
GARY MCGEE & CO. - TAX SERVICES	2,507.	0.		2,507.
LAURA A. BROWER - ACCOUNTING SERVICES	508.	0.		508.
TO FORM 990-PF, PG 1, LN 16B	3,015.	0.		3,015.

FORM 990-PF	OTHER PROFESSIONAL FEES			STATEMENT 5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
U.S. TRUST - INVESTMENT MGMT. FEES	51,776.	51,776.		0.
CHARLES BUSCH - WAR PREVENTION INITIATIVE CONSULTING	6,000.	0.		4,000.
ERIN K. THOMAS - ROTARIAN ACTION GROUP FOR PEACE CONSULTING	24,448.	0.		21,402.
DENNIS WONG - ROTARIAN ACTION GROUP FOR PEACE CONSULTING	5,000.	0.		5,000.
MARIANA PALOMA AYALA VELA - DESIGN SERVICES	5,145.	0.		2,345.
PINPOINT LOGIC - WEBSITE STRATEGY AND DESIGN SERVICES	23,290.	0.		23,290.
OTHER CONSULTANTS	4,172.	0.		4,172.
TO FORM 990-PF, PG 1, LN 16C	119,831.	51,776.		60,209.

FORM 990-PF	TAXES			STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
EXCISE TAX ON INVESTMENT INCOME	9,766.	0.		0.	
PAYROLL TAXES	13,213.	2,642.		10,571.	
TO FORM 990-PF, PG 1, LN 18	22,979.	2,642.		10,571.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
INTERNET	423.	85.		338.	
TELEPHONE	2,735.	547.		2,188.	
LICENSES AND PERMITS	520.	104.		416.	
POSTAGE AND DELIVERY	125.	25.		100.	
OFFICE SUPPLIES	2,786.	557.		2,229.	
OTHER	1,173.	234.		939.	
PROGRAM EXPENSES	7,842.	0.		7,842.	
DUES AND SUBSCRIPTIONS	6,790.	1,358.		5,432.	
OREGON CHARITY REGISTRATION FEES	1,100.	0.		1,100.	
TO FORM 990-PF, PG 1, LN 23	23,494.	2,910.		20,584.	

FORM 990-PF	OTHER INCREASES IN NET ASSETS OR FUND BALANCES			STATEMENT	8
DESCRIPTION	AMOUNT				
NET INCREASE IN THE FAIR VALUE OF INVESTMENTS	879,411.				
TOTAL TO FORM 990-PF, PART III, LINE 3	879,411.				

FORM 990-PF	CORPORATE STOCK	STATEMENT	9
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
EQUITY SECURITIES	6,102,445.	6,102,445.
TOTAL TO FORM 990-PF, PART II, LINE 10B	6,102,445.	6,102,445.

FORM 990-PF	CORPORATE BONDS	STATEMENT	10
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
FIXED INCOME SECURITIES	2,063,302.	2,063,302.
TOTAL TO FORM 990-PF, PART II, LINE 10C	2,063,302.	2,063,302.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	11
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
WEATHERFLOW OFFSHORE FUND I LTD	FMV	1,903,655.	1,903,655.
SKY HARBOR SHORT DURATION HIGH YIELD PARTNERSHIP LP	FMV	813,051.	813,051.
TCW SECURITIZED OPPORTUNITIES LP	FMV	777,842.	777,842.
COMMON SENSE OFFSHORE LDT	FMV	375,253.	375,253.
ECOTRUST FORESTS LLC	FMV	144,743.	144,743.
REAL ESTATE/ALTERNATIVE INVESTMENTS	FMV	130,224.	130,224.
PIMCO COMMODITY REAL RETURN STRATEGY FUND	FMV	156,193.	156,193.
SPDR GOLD TR GOLD SHS	FMV	124,248.	124,248.
POST LIMITED TERM HIGH YIELD	FMV	36,190.	36,190.
TOTAL TO FORM 990-PF, PART II, LINE 13		4,461,399.	4,461,399.

FORM 990-PF

PART VIII - LIST OF OFFICERS, DIRECTORS
TRUSTEES AND FOUNDATION MANAGERS

STATEMENT 12

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
M. ALBIN JUBITZ, JR. 221 N.W. SECOND AVENUE, SUITE 204 PORTLAND, OR 97209	PRESIDENT 10.00	0.	0.	0.
ELIZABETH JUBITZ SAYLER 221 N.W. SECOND AVENUE, SUITE 204 PORTLAND, OR 97209	VICE PRESIDENT 2.00	1,500.	0.	0.
SARAH C. JUBITZ 221 N.W. SECOND AVENUE, SUITE 204 PORTLAND, OR 97209	TREASURER 2.00	1,500.	0.	0.
KATHERINE H. JUBITZ 221 N.W. SECOND AVENUE, SUITE 204 PORTLAND, OR 97209	SECRETARY 2.00	1,500.	0.	0.
RAYMOND G. JUBITZ 221 N.W. SECOND AVENUE, SUITE 204 PORTLAND, OR 97209	EXEC. DIRECTOR 40.00	88,750.	6,036.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		93,250.	6,036.	0.

FORM 990-PF

EXPENDITURE RESPONSIBILITY STATEMENT
PART VII-B, LINE 5C

STATEMENT 13

GRANTEE'S NAME

SYNESI LLC

GRANTEE'S ADDRESS

17 PARTRIDGE LANE
LAKE OSWEGO, OR 97035

GRANT AMOUNT	DATE OF GRANT	AMOUNT EXPENDED
20,020.	04/22/13	16,205.

PURPOSE OF GRANT

TO HELP FACILITATE THE WORK OF THE ROTARIAN ACTION GROUP FOR PEACE (RAGFP) ON A GLOBAL SCALE: THROUGH APPROPRIATE DATA COLLECTION AND DESIGN, GRANT FUNDS WILL HELP PRODUCE A DYNAMIC INTERACTIVE MAPPING INTERFACE THAT WILL OFFER ROTARIAN USERS WORLDWIDE THE OPPORTUNITY TO PROCURE RELEVANT INFORMATION FOR DESIGNING AND DEVELOPING THEIR PEACE PROJECTS IN THEIR RESPECTIVE CLUBS AND DISTRICTS. IN ADDITION, GRANT FUNDS WILL HELP DEVELOP AN EFFORT TO PROMOTE THE USE OF THE MAP WITHIN THE ROTARY WORLD AS WELL AS AMONG POTENTIAL AND ACTUAL PARTNER ORGANIZATIONS.

DATES OF REPORTS BY GRANTEE

ONGOING

ANY DIVERSION BY GRANTEE

NONE

RESULTS OF VERIFICATION

BECAUSE THIS IS AN ONGOING PROJECT BEING CONSTANTLY SUPERVISED BY THE DIRECTOR OF THE RAGFP THERE IS ONGOING CORRESPONDENCE INDICATING PROGRESS. REPORTING FROM THE GRANTEE HAS BEEN ONGOING AND THE MAPPING INTERFACE WAS JUST PRESENTED AT THE ROTARY INTERNATIONAL CONVENTION IN SYDNEY, AUSTRALIA, ON MAY 30, 2014. ADDITIONAL WORK REMAINS, HOWEVER, AND SHOULD BE COMPLETED BY JULY 30, 2014.

FORM 990-PF	SUMMARY OF DIRECT CHARITABLE ACTIVITIES	STATEMENT 14
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ACTIVITY ONE

THE JUBITZ FAMILY FOUNDATION HAS INITIATED TWO PROGRAMS THAT FOCUS ON ENDING WAR BY 2030. THE FIRST IS THE WAR PREVENTION INITIATIVE (WPI) THAT BRINGS TOGETHER ACADEMICS AND ACTIVISTS TO FOCUS ON BUILDING THE CASE FOR NON-VIOLENCE AND PEACE BUILDING AND DEMONSTRATING THAT DIPLOMACY AND NON-VIOLENCE IS MORE EFFECTIVE IN SETTLING CONFLICTS THAN MILITARY INTERVENTION. THE SECOND INITIATIVE IS THE ROTARIAN ACTION GROUP FOR PEACE THAT REACHES OUT TO ROTARIANS THROUGHOUT THE WORLD TO TEACH PEACE TO ROTARIANS AND OTHERS WHEREVER THEY LIVE. BOTH INITIATIVES HAVE VERY ROBUST PROGRAMS FOR REACHING OUT AND EDUCATING PEOPLE THROUGH PERSONAL CONTACT, SPEECHES AND WEBSITE CONTENT. WPI HAS HOSTED GATHERINGS OF NATIONAL AND INTERNATIONAL EXPERTS TO ENGAGE IN ONGOING CONSTRUCTIVE DIALOG ON WAR PREVENTION ISSUES.

EXPENSES

TO FORM 990-PF, PART IX-A, LINE 1

85,323.

FORM 990-PF	SUMMARY OF DIRECT CHARITABLE ACTIVITIES	STATEMENT 15
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ACTIVITY TWOWAR PREVENTION INITIATIVE -

1. DEVELOP AN EFFECTIVE STRATEGY TO CONVINCE AMERICANS THAT THE U.S. SHOULD NOT PROMOTE WAR, MILITARISM, AND WEAPONS PROLIFERATION, AND RATHER EMBRACE CONFLICT RESOLUTION PRACTICES THAT HAVE BEEN SHOWN TO PREVENT, SHORTEN, AND ELIMINATE WAR AS A VIABLE SOLUTION TO GLOBAL, REGIONAL, AND LOCAL CONFLICTS;
2. FACILITATING ANNUAL OR BI-ANNUAL MEETINGS TO DISCUSS NEW IDEAS AND PROJECTS OF STRATEGIC WAR PREVENTION;
3. DEVELOP A SIGNIFICANT ROLE FOR ROTARY INTERNATIONAL IN GLOBAL WAR PREVENTION EFFORTS ("EARLY WARNING SYSTEM");
4. CREATE A COALITION OF NATIONAL AND INTERNATIONAL ACADEMIC AND NON-ACADEMIC EXPERTS WHO WE CAN ENGAGE IN ONGOING CONSTRUCTIVE DIALOG ON WAR PREVENTION ISSUES;
5. INITIATE A HUB FOR WAR PREVENTION EFFORTS;
6. IDENTIFY FUNCTIONS TO PREVENT WAR;
7. CONSTANTLY EDUCATING OURSELVES ON STATE-OF-ART KNOWLEDGE RELATED TO WAR PREVENTION;

JUBITZ.FAMILY FOUNDATION

93-1324016

8. WRITING REFLECTION PAPERS AND CREATING REPORTS FOR SELF
AND PUBLIC AWARENESS.

EXPENSES

TO FORM 990-PF, PART IX-A, LINE 2

75,155.

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION
PART XV, LINES 2A THROUGH 2D

STATEMENT 16

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

MR. RAYMOND JUBITZ, EXECUTIVE DIRECTOR
211 N.W. SECOND AVENUE, SUITE 210
PORTLAND, OR 97209

TELEPHONE NUMBER

(503) 274-6255

FORM AND CONTENT OF APPLICATIONS

I. LETTER OF INQUIRY ("LOI")- APPLICANTS MUST FIRST COMPLETE AN LOI THAT PROVIDES A SUMMARY OF THE GRANT REQUEST. THE LOI FORM CAN BE FOUND ON THE THE FOUNDATION'S WEBSITE.

II. SITE VISIT- UPON APPROVAL OF AN LOI, A SITE VISIT WILL BE SCHEDULED. FOLLOWING THE SITE VISIT, THE APPLICANTS WILL BE NOTIFIED AS TO WHETHER THEY SHOULD SUBMIT A GRANT APPLICATION.

III. GRANT APPLICATION- THE APPLICATION FORM CAN BE FOUND ON THE FOUNDATION'S WEBSITE AND REQUIRES THE FOLLOWING INFORMATION: A DETAILED PROGRAM BUDGET WITH ALL SOURCES OF INCOME; ANTICIPATED OUTCOMES OF THE PROJECT/PROGRAM AND HOW THEY WILL BE MEASURED AND EVALUATED; A LIST OF THE BOARD OF DIRECTORS; A LIST OF CURRENT MAJOR DONORS; A COPY OF THE

ANY SUBMISSION DEADLINES

GRANT REQUESTS MUST BE RECEIVED THREE MONTHS AHEAD OF THE APRIL 1 AND OCTOBER 1 GRANT DEADLINES.

RESTRICTIONS AND LIMITATIONS ON AWARDS

EARLY CHILDHOOD DEVELOPMENT AND YOUTH EDUCATION, WITH AN EMPHASIS ON CHILDREN AT-RISK.

ENVIRONMENTAL STEWARDSHIP, WITH AN EMPHASIS ON RIVERS AND THEIR WATERSHED ECOSYSTEMS.

PEACEMAKING ACTIVITIES, WITH AN EMPHASIS ON TEACHING PEACE AND CONFLICT RESOLUTION.

FORM 990-PF	GRANT APPLICATION SUBMISSION INFORMATION	STATEMENT	17
	PART XV, LINES 2A - 2D (CONTINUATION)		

FORM AND CONTENT OF APPLICATIONS

ORGANIZATION'S IRS DETERMINATION LETTER; AND THE ORGANIZATION'S MOST
CURRENT FINANCIAL STATEMENTS AND 990.

Application for Extension of Time To File an Exempt Organization Return

OMB No. 1545-1709

Department of the Treasury
Internal Revenue Service

► **File a separate application for each return.**
► **Information about Form 8868 and its instructions is at www.irs.gov/form8868.**

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒ **X**
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form).

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.

Electronic filing (e-file). You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit www.irs.gov/efile and click on *e-file for Charities & Nonprofits*.

Part I Automatic 3-Month Extension of Time. Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete

Part I only ☐

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

Type or print	Name of exempt organization or other filer, see instructions.	Enter filer's identifying number
	JUBITZ FAMILY FOUNDATION	Employer identification number (EIN) or 93-1324016
File by the due date for filing your return. See instructions	Number, street, and room or suite no. If a P.O. box, see instructions. 221 N.W. SECOND AVENUE, NO. 210	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. PORTLAND, OR 97209	

Enter the Return code for the return that this application is for (file a separate application for each return)

04

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720 (other than individual)	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

THE FOUNDATION

- The books are in the care of ► **221 N.W. SECOND AVENUE, SUITE 210 - PORTLAND, OR 97209**
Telephone No. ► **(503) 274-6255** Fax No. ► **(503) 274-6256**
- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ☐. If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for.

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until **AUGUST 15, 2014**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:
► ☒ calendar year **2013** or
► ☐ tax year beginning _____, and ending _____

2 If the tax year entered in line 1 is for less than 12 months, check reason: ☐ Initial return ☐ Final return
☐ Change in accounting period

3a If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	0.
b If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$	0.
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$	0.

Caution. If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.