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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 STEPHENSON FOUNDATION		A Employer identification number 94-3320092
Number and street (or P.O. box number if mail is not delivered to street address) 3000 SAND HILL ROAD, BLDG. 4	Room/suite 250	B Telephone number (650) 854-3927
City or town, state or province, country, and ZIP or foreign postal code MENLO PARK, CA 94025		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) \$ 24,121,649.	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				N/A	
2 Check ☒ if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments		245.	245.		STATEMENT 2
4 Dividends and interest from securities		495,652.	493,183.		STATEMENT 3
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		473,949.			STATEMENT 1
b Gross sales price for all assets on line 6a 5,028,345.					
7 Capital gain net income (from Part IV, line 2)			474,066.		
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		89.	89.		STATEMENT 4
12 Total. Add lines 1 through 11		969,935.	967,583.		
13 Compensation of officers, directors, trustees, etc		0.	0.		0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees					
c Other professional fees STMT 5		122,441.	104,441.		0.
17 Interest					
18 Taxes STMT 6		36,420.	16,910.		0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses STMT 7		75.	0.		0.
24 Total operating and administrative expenses. Add lines 13 through 23		158,936.	121,351.		0.
25 Contributions, gifts, grants paid		1,020,743.			1,020,743.
26 Total expenses and disbursements. Add lines 24 and 25		1,179,679.	121,351.		1,020,743.
27 Subtract line 26 from line 12		-209,744.			
a Excess of revenue over expenses and disbursements					
b Net investment income (if negative, enter -0-)			846,232.		
c Adjusted net income (if negative, enter -0-)				N/A	

Part II Balance Sheets		Beginning of year (a) Book Value	End of year	
			(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	661,590.	415,569.	415,569.
	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	18,055,085.	17,857,975.	22,194,017.
	c Investments - corporate bonds			
	11 Investments - land, buildings, and equipment basis ▶			
Liabilities	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other STMT 10	884,309.	1,172,990.	1,512,063.
	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)	19,600,984.	19,446,534.	24,121,649.
	17 Accounts payable and accrued expenses			
	18 Grants payable			
	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)	0.	0.	
	Foundations that follow SFAS 117, check here ▶ ☐			
	and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒			
	and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	0.	0.	
	28 Paid-in or capital surplus, or land, bldg, and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	19,600,984.	19,446,534.	
	30 Total net assets or fund balances	19,600,984.	19,446,534.	
	31 Total liabilities and net assets/fund balances	19,600,984.	19,446,534.	

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	19,600,984.
2 Enter amount from Part I, line 27a	2	-209,744.
3 Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 8	3	55,294.
4 Add lines 1, 2, and 3	4	19,446,534.
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	19,446,534.

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			
b SEE ATTACHED STATEMENT			
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			
b			
c			
d			
e 5,028,345.		4,554,279.	474,066.

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			
b			
c			
d			
e			474,066.

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	474,066.
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	1,015,346.	20,496,750.	.049537
2011	972,508.	20,800,250.	.046755
2010	843,371.	19,993,552.	.042182
2009	1,099,974.	17,160,910.	.064098
2008	1,239,034.	21,937,878.	.056479

2 Total of line 1, column (d)	2	.259051
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	.051810
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	22,593,059.
5 Multiply line 4 by line 3	5	1,170,546.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	8,462.
7 Add lines 5 and 6	7	1,179,008.
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions	8	1,020,743.

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	16,925.
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	16,925.
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	16,925.
6 Credits/Payments		
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	10,737.
b Exempt foreign organizations - tax withheld at source	6b	
c Tax paid with application for extension of time to file (Form 8868)	6c	16,000.
d Backup withholding erroneously withheld	6d	
7 Total credits and payments. Add lines 6a through 6d	7	26,737.
8 Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached	8	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	9,812.
11 Enter the amount of line 10 to be Credited to 2014 estimated tax ☐ 9,812. Refunded ☐	11	0.

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
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
1c 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) ☐ CA		
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

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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 ► N/A	13	X	
14	The books are in care of ► BARBARA STEPHENSON Telephone no ► (650) 854-3927 Located at ► 3000 SAND HILL RD BLDG #4-250, MENLO PARK, CA ZIP+4 ► 94025			
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 N/A ► ☐	1b	
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?	1c	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? ☐ Yes ☒ 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) 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

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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)?

N/A

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?

N/A

☐ 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?

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
BARBARA STEPHENSON 3000 SAND HILL ROAD, BLDG #4-280 MENLO PARK, CA 94025	PRESIDENT 1.00	0.	0.	0.
THOMAS F. STEPHENSON 3000 SAND HILL ROAD, BLDG #4-280 MENLO PARK, CA 94025	VICE PRESIDENT 1.00	0.	0.	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

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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	21,414,122.
b	Average of monthly cash balances	1b	567,003.
c	Fair market value of all other assets	1c	955,991.
d	Total (add lines 1a, b, and c)	1d	22,937,116.
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	22,937,116.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	344,057.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	22,593,059.
6	Minimum investment return. Enter 5% of line 5	6	1,129,653.

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	1,129,653.
2a	Tax on investment income for 2013 from Part VI, line 5	2a	16,925.
b	Income tax for 2013 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	16,925.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	1,112,728.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	1,112,728.
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	1,112,728.

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	1,020,743.
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	1,020,743.
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	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	1,020,743.

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.

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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				1,112,728.
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only			1,009,483.	
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2013				
a From 2008				
b From 2009				
c From 2010				
d From 2011				
e From 2012				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 1,020,743.				
a Applied to 2012, but not more than line 2a			1,009,483.	
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				11,260.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b Taxable amount - see instructions		0.		
e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount - see instr			0.	
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014				1,101,468.
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	0.			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9				
a Excess from 2009				
b Excess from 2010				
c Excess from 2011				
d Excess from 2012				
e Excess from 2013				

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9)

N/A

- 1 a** If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2013, enter the date of the ruling

b Check box to indicate whether the foundation is a private operating foundation described in section

☐ 4942(I)(3) or ☐ 4942(I)(5)

- 2 a** Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

b 85% of line 2a

c Qualifying distributions from Part XII,
line 4 for each year listed

d Amounts included in line 2c not used directly for active conduct of exempt activities

e Qualifying distributions made directly for active conduct of exempt activities

Subtract line 2d from line 2c

- 3** Complete 3a, b, or c for the alternative test relied upon

a "Assets" alternative test - enter
(1) Value of all assets

(2) Value of assets qualifying under section 4942(j)(3)(B)(i)

b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed

c "Support" alternative test - enter

(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

(2) Support from general public and 5 or more exempt organizations as provided in section 4942(i)(3)(B)(iii)

(3) Largest amount of support from an exempt organization

(4) Gross investment income

Part XV **Supplementary Information** (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year-see instructions.)

1 Information Regarding Foundation Managers:

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

SEE STATEMENT 11

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

NONE

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed

BARBARA STEPHENSON, (650) 854-3927

3000 SAND HILL RD. BLDG #4-250, MENLO PARK, CA 94025

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

WRITTEN

c Any submission deadlines

NONE

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

NONE

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				
SEE STATEMENT ATTACHED				1,020,743.
Total			3a	1,020,743.
b Approved for future payment				
NONE				
Total			3b	0.

Part XVI-A

Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
1 Program service revenue					
a _____					
b _____					
c _____					
d _____					
e _____					
f _____					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	245.	
4 Dividends and interest from securities			14	495,652.	
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income			14	89.	
8 Gain or (loss) from sales of assets other than inventory			18	473,949.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue					
a _____					
b _____					
c _____					
d _____					
e _____					
12 Subtotal. Add columns (b), (d), and (e)		0.		969,935.	0.
13 Total. Add line 12, columns (b), (d), and (e)				13 969,935.	

(See worksheet in line 13 instructions to verify calculations)

Part XVI-B

Relationship of Activities to the Accomplishment of Exempt Purposes

[illegible]

Part XVII 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		

Sign Here	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.				May the IRS discuss this return with the preparer shown below (see instr.)? ☒ Yes ☐ No	
	Signature of officer or trustee <i>[Signature]</i>		Date <i>11/12/14</i>		Title <i>VP</i>	
Paid Preparer Use Only	Print/Type preparer's name KAREN VALLADAO		Preparer's signature <i>[Signature]</i>		Date <i>11/12/14</i>	
	Check ☐ if self-employed		PTIN P00534214			
	Firm's name ▶ FRANK, RIMERMAN & CO. LLP				Firm's EIN ▶ 94-1341042	
	Firm's address ▶ 1801 PAGE MILL ROAD PALO ALTO, CA 94304				Phone no (650) 845-8100	

Form **990-PF** (2013)

STEPHENSON FOUNDATION

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	FIDELITY #Y89-891371 - SEE STATEMENT ATTACHED	P	VARIOUS	VARIOUS
b	FIDELITY #Y89-891371 - SEE STATEMENT ATTACHED	P	VARIOUS	VARIOUS
c	CAPITAL GUARDIAN #44-150800 - SEE STATEMENT ATTAC	P	VARIOUS	VARIOUS
d	CAPITAL GUARDIAN #44-150800 - SEE STATEMENT ATTAC	P	VARIOUS	VARIOUS
e	WORTHLESS STOCK 3,067 SHS A123 SYSTEMS INC.	P	VARIOUS	05/21/13
f	SC BUYOUTS LLC	P	VARIOUS	VARIOUS
g	SC X PRINCIPALS FUND	P	VARIOUS	VARIOUS
h	CAPITAL GAINS DIVIDENDS			
i				
j				
k				
l				
m				
n				
o				

(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 144,485.		159,541.	-15,056.
b 1,998,787.		1,887,673.	111,114.
c 194,970.		216,905.	-21,935.
d 2,403,741.		2,265,223.	138,518.
e		5,266.	-5,266.
f 665.			665.
g		19,671.	-19,671.
h 285,697.			285,697.
i			
j			
k			
l			
m			
n			
o			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
(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	
a			-15,056.
b			111,114.
c			-21,935.
d			138,518.
e			-5,266.
f			665.
g			-19,671.
h			285,697.
i			
j			
k			
l			
m			
n			
o			

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	474,066.
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



CAPITAL GROUP™

Private Client Services

Portfolio Holdings Summary by Sector

STEPHENSON FOUNDATION

Account Number: XXXX50800

As of December 31, 2013
Reporting Currency: USD

Description	Total Cost	Total Market Value	% of Asset Class	% of Total Net Assets
Cash and Cash Equivalents				
CASH AND CASH EQUIVALENTS	211,306	211,306	100.0	1.5
Total Cash and Cash Equivalents	211,306	211,306	100.0	1.5
Fixed Income				
MUTUAL FUNDS	3,059,883	3,113,733	100.0	22.7
Total Fixed Income	3,059,883	3,113,733	100.0	22.7
Equity				
ENERGY	463,871	554,884	5.7	4.0
MATERIALS	477,972	541,318	5.5	3.9
INDUSTRIALS	939,776	1,292,532	13.2	9.4
CONSUMER DISCRETIONARY	884,293	1,358,473	13.9	9.9
CONSUMER STAPLES	615,302	747,684	7.6	5.4
HEALTH CARE	785,844	1,399,466	14.3	10.2
FINANCIALS	1,240,721	1,596,559	16.3	11.6
INFORMATION TECHNOLOGY	1,061,086	1,498,072	15.3	10.9
TELECOMMUNICATION SERVICES	122,705	228,337	2.3	1.7
UTILITIES	36,148	52,180	0.5	0.4
MUTUAL FUNDS	600,635	521,006	5.3	3.8
Total Equity	7,228,354	9,790,511	100.0	71.3



FIDELITY PRIVATE
CLIENT GROUPSM

Investment Report

December 1, 2013 - December 31, 2013

Your Portfolio Details

Portfolio Advisory Services Y89-891371

STEPHENSON FOUNDATION

Account Summary

Beginning value as of Dec 1 \$9,236,331.02
Transfers between Fidelity accounts -87,500.00
Change in investment value 158,719.65
Ending value as of Dec 31 **\$9,307,550.67**

Accrued Interest (AI) \$0.00
Change in AI from last statement \$0.00

Percentage change in value 1.72%

Income Summary

Taxable
Dividends \$58,059.28
St cap gain 64,697.89
Lt cap gain 128,860.76
Total **\$251,617.93**

Year to Date
\$127,785.32
74,880.55
261,937.54
\$464,603.41

Realized Gain/Loss from Sales

Short-term gain \$0.00
Short-term loss 0.00
St disallowed loss 0.00
Net short 0.00

Long-term gain \$4,685.42
Long-term loss 0.00
Lt disallowed loss 0.00
Net long **4,685.42**

Year to Date
\$149.03
-15,184.68
2.20
-15,033.45

Total Cost Basis
Total Value
December 1, 2013
December 31, 2013
\$1,222,014.94
\$1,147,096.62
1,151,737.13
156,594.72
559,463.80
509,026.23
2,040,079.02
85,955.40
94,242.96

Holdings (Symbol) as of December 31, 2013

Stock Funds

	Percentage of Holding	Quantity December 31, 2013	Price per Unit December 31, 2013
STRATEGIC ADVISERS CORE FUND (FCSAX) EAI: \$12,013.91, EY: 0.96%	13.47%	84,013.383	\$14.930
STRATEGIC ADVISERS GROWTH FUND (FSGFX) EAI: \$6,941.26, EY: 0.61%	12.32%	71,559.365	16.030
STRATEGIC ADVISERS VALUE FUND (FVSAX) EAI: \$15,524.79, EY: 1.35%	12.37%	63,108.884	18.250
STRATEGIC ADVISERS EMERGING MARKETS (FSAMX) EAI: \$2,129.43, EY: 1.36%	1.68%	16,380.201	9.560
STRATEGIC ADVISERS US OPPTY FUND (FUSOX) EAI: \$4,232.79, EY: 0.76%	6.01%	46,008.536	12.160
STRATEGIC ADVISERS SMALL-MID CAP FD (FSCFX) EAI: \$1,535.85, EY: 0.30%	5.46%	36,567.976	13.920
STRATEGIC ADVISERS INTERNATIONAL FUND (FILFX) EAI: \$49,860.14, EY: 2.44%	21.91%	190,305.879	10.720
ARDEN ALTERNATIVE STRATEGIES CLASS I (ARDNX)	0.92%	8,296.854	10.360
BLACKSTONE ALTERNATIVE MULTI-MANAGER I (BXMXX)	1.01%	9,027.104	10.440

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FIDELITY PRIVATE
CLIENT GROUP SM

Investment Report

December 1, 2013 - December 31, 2013

Portfolio Advisory Services Y89-891371

Holdings (Symbol) as of December 31, 2013	STEPHENSON FOUNDATION	Percentage of holding	Quantity December 31, 2013	Price per Unit December 31, 2013	Total Cost Basis	Total Value December 1, 2013	Total Value December 31, 2013
Subtotal of Stock Funds		75.15%			5,304,234.60		6,998,515.69

Bond Funds

FIDELITY SHORT TERM BOND (FSHBX) EAI \$957.86, EY: 0.81%	1.26%	13,755.420	8.580	118,296.56	118,208.75	118,021.50
FIDELITY TOTAL BOND (FTBFX) EAI: \$7,375.34, EY: 2.84%	2.78%	24,854.196	10.440	268,421.12	260,560.29	259,477.81
STRATEGIC ADVISERS SHORT DURATION FUND (FAUDX) EAI: \$3,265.26, EY: 0.78%	4.48%	41,491.590	10.060	417,529.74	417,733.07	417,405.40
STRATEGIC ADVISERS INCOME OPPORTUNITIES (FPIOX) EAI: \$19,669.60, EY: 5.59%	3.78%	34,307.545	10.260	334,604.53	350,453.12	351,995.41
STRATEGIC ADVISERS CORE INCOME FUND (FPCIX) EAI: \$22,205.58, EY: 2.79%	8.54%	76,240.809	10.430	815,160.06	800,037.23	795,191.64
PIMCO TOTAL RETURN ADMINISTRATIVE SHS (PTRAX) EAI \$3,966.88, EY: 2.33%	1.83%	15,938.184	10.690	177,738.44	171,981.45	170,379.18
PIMCO SHORT TERM ADMINISTRATIVE SHS (PSFAX) EAI: \$15.07, EY: 0.81%	0.02%	189.238	9.850	1,865.98	62,237.47	1,863.99
TEMPLETON GLOBAL BOND CLASS A (TPINX) EAI \$4,625.51, EY: 3.65%	1.36%	9,636.470	13.140	124,763.21	125,080.27	126,623.21
Subtotal of Bond Funds	24.05%			2,258,379.64		2,240,958.14

Short-term Funds

FIDELITY CASH RESERVES (FDRXX) FIMM MMKT PORT INST CL (FNSXX) EAI: \$86.00, EY: 0.13%	0.00% 0.73%	0.210 68,076.630	1.000 1.000	not applicable not applicable	78,071.66	0.21 68,076.63
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FIDELITY PRIVATE
CLIENT GROUP S.M

Investment Report

December 1, 2013 - December 31, 2013

Portfolio Advisory Services Y89-891371		STEPHENSON FOUNDATION		Total Value	
Holdings (Symbol) as of December 31, 2013	Percentage of holding	Quantity	Price per Unit	December 1, 2013	December 31, 2013
Subtotal of Short-term Funds	0.73%				68,076.84

Total PAS Managed Funds	100.00%				9,307,550.67
Total				\$ 7,562,614.24	\$9,307,550.67

Total Cost Basis does not include the cost basis on core, money market or other positions where cost basis is unknown or not applicable.

r - Please note that due to rounding, percentages may not add to 100%.

Estimated Annual Income (EAI) & Estimated Yield (EY) - EAI is an estimate of annual income for a specific security position over the next rolling 12 months. EY is calculated by dividing the current EAI for a security position by its statement closing date market value. EY reflects only the income generated by an investment; it does not reflect changes in its price, which may fluctuate. For certain types of securities, EAI and EY could include the return of principal or capital gains which would render them overstated. EAI and EY are estimates provided for informational purposes only and should not be relied on for making investment, trading, or tax decisions. There is no guarantee that your investments will actually generate the EAI or EY presented. Actual income and yield might be lower or higher. EAI and EY should not be confused with a security's 30-day Yield or 7-day Yield, if provided, as such yield quotations reflect the actual historical performance of a security. For additional information, including calculation details, refer to the "Additional Information and Endnotes" section at the end of your statement.



FORM 990-PF GAIN OR (LOSS) FROM SALE OF ASSETS STATEMENT 1

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
FIDELITY #Y89-891371 - SEE STATEMENT ATTACHED	PURCHASED	VARIOUS	VARIOUS

(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
144,485.	159,543.	0.	0.	-15,058.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
FIDELITY #Y89-891371 - SEE STATEMENT ATTACHED	PURCHASED	VARIOUS	VARIOUS

(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
1,998,787.	1,887,788.	0.	0.	110,999.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
CAPITAL GUARDIAN #44-150800 - SEE STATEMENT ATTACHED	PURCHASED	VARIOUS	VARIOUS

(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
194,970.	216,905.	0.	0.	-21,935.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
CAPITAL GUARDIAN #44-150800 - SEE STATEMENT ATTACHED	2,403,741.	2,265,223.	0.	0.	138,518.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
WORTHLESS STOCK 3,067 SHS A123 SYSTEMS INC.	0.	5,266.	0.	0.	-5,266.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
SC BUYOUTS LLC	665.	0.	0.	0.	665.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
SC X PRINCIPALS FUND	0.	19,671.	0.	0.	-19,671.

CAPITAL GAINS DIVIDENDS FROM PART IV	285,697.
TOTAL TO FORM 990-PF, PART I, LINE 6A	473,949.

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 2

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
SEQUOIA CAPITAL BUYOUTS, LLC	12.	12.	
SEQUOIA CAPITAL FRANCHISE PARTNERS, LP	4.	4.	
SEQUOIA CAPITAL IX PRINCIPAL'S FUND	3.	3.	
SEQUOIA CAPITAL X PRINCIPAL'S FUND	226.	226.	
TOTAL TO PART I, LINE 3	245.	245.	

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 3

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
CAPITAL GUARDIAN #150800 DIVIDENDS	311,427.	23,759.	287,668.	285,199.	
FIDELITY #Y89-891371	466,379.	261,938.	204,441.	204,441.	
FIDELITY #Z10-049204	25.	0.	25.	25.	
SC FRANCHISE PARTNERS, LP	2.	0.	2.	2.	
SEQUOIA CAPITAL X PRINCIPAL'S FUND	3,516.	0.	3,516.	3,516.	
TO PART I, LINE 4	781,349.	285,697.	495,652.	493,183.	

FORM 990-PF OTHER INCOME STATEMENT 4

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
SC FRANCHISE PARTNERS, LP	-838.	-838.	
SC BUYOUTS	927.	927.	
TOTAL TO FORM 990-PF, PART I, LINE 11	89.	89.	

FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT MANAGEMENT FEES	102,687.	102,687.		0.
PORTFOLIO DEDUCTIONS	1,718.	1,718.		0.
ACCOUNTING FEES	18,000.	0.		0.
INVESTMENT INTEREST EXPENSE	36.	36.		0.
TO FORM 990-PF, PG 1, LN 16C	122,441.	104,441.		0.

FORM 990-PF	TAXES	STATEMENT	6
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES	16,910.	16,910.		0.
STATE TAXES	10.	0.		0.
FEDERAL TAXES	19,500.	0.		0.
TO FORM 990-PF, PG 1, LN 18	36,420.	16,910.		0.

FORM 990-PF	OTHER EXPENSES	STATEMENT	7
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FILING FEES	75.	0.		0.
TO FORM 990-PF, PG 1, LN 23	75.	0.		0.

FORM 990-PF	OTHER INCREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	8
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DESCRIPTION	AMOUNT
UNREALIZED GAIN/LOSS - FMV ADJUSTMENT	55,294.
TOTAL TO FORM 990-PF, PART III, LINE 3	55,294.

FORM 990-PF	CORPORATE STOCK	STATEMENT	9
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
MUTUAL FUNDS (FIXED) HELD AT CAPITAL GUARDIAN - SEE STMT ATTACHED	3,059,883.	3,113,733.
SECURITIES HELD AT CAPITAL GUARDIAN - SEE STMT ATTACHED	7,228,354.	9,790,511.
SECURITIES HELD AT FIDELITY Y89-891371- SEE STMT ATTACHED	7,562,614.	9,239,474.
3,067 SHS A123 SYSTEMS, INC.	0.	0.
972 SHS INFOBLOX INC	5,497.	32,095.
1,282 SHS RUCKUS WIRELESS INC.	1,627.	18,204.
TOTAL TO FORM 990-PF, PART II, LINE 10B	17,857,975.	22,194,017.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	10
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
SEQUOIA CAPITAL BUYOUTS, LLC	FMV	99,618.	99,618.
SEQUOIA CAPITAL X PRINCIPAL'S FUND	FMV	98,110.	98,110.
SEQUOIA CAPITAL IX PRINCIPAL'S FUND	FMV	274,865.	274,865.
SEQUOIA CAPITAL FRANCHISE PARTNERS, LP	FMV	100,397.	432,481.
CAPITAL GROUP ALTERNATIVE STRATEGIES (OFFSHORE) LP	FMV	600,000.	606,989.
TOTAL TO FORM 990-PF, PART II, LINE 13		1,172,990.	1,512,063.

FORM 990-PF

PART XV - LINE 1A
LIST OF FOUNDATION MANAGERS

STATEMENT 11

NAME OF MANAGER

BARBARA STEPHENSON
THOMAS F. STEPHENSON

Stephenson Foundation
Charitable Grants
12/31/2013

Payee	Amount	Address	Recipient Status	Purpose of Grant
Friends of Harvard Baseball	10,000 00	124 MOUNT AUBURN STREET CAMBRIDGE MA 02138-5795	Public Charity	SUPPORT HARVARD ATHLETICS BASEBALL
American Red Cross	2,500 00	875 FERN STREET, WEST PALM BEACH, FL 33401	Public Charity	SUPPORT LOCAL DISASTER RESPONSE
Menlo Park Atherton Education Foundation	5,000 00	381 EUCALYPTUS AVENUE, ATHERTON, CA 94027	Public Charity	SUPPORT MENLO PARK ATHERTON SCHOOL DISTRICTS ASSIST IN PROVIDING FELLOWSHIPS
Wilmington Friends School	5,500 00	101 SCHOOL ROAD WILMINGTON, DE 19803 888 SEVENTEENTH STREET NW, SUITE 306, WASHINGTON, DC 20006 3312	Public Charity	SUPPORT THE ROLE OF AMERICAN AMBASSADOR AND THE COUNTRY TEAM IN CARRYING OUT US FOREIGN POLICY AT EMBASSIES AROUND THE WORLD
Council of American Ambassadors	2,000 00	326 GALVEZ STREET, STANFORD, CA 94305- 6105	Public Charity	SUPPORT STANFORD ATHLETICS GOLF
Stanford University - The Shultz Tournament	5,000 00	401 PIERCE ROAD, MENLO PARK, CA 94025 180 HOWARD STREET, SUITE 100, SAN FRANCISCO, CA 94105-1617	Public Charity	SUPPORT COMMUNITY YOUTH IN NEED
Boys And Girls Club	3,500 00	2440 W EL CAMINO REAL #300, MOUNTAIN VIEW, CA 94040	Public Charity	SUPPORT SUMMER YOUTH PROGRAM
Catholic Charities CYO	1,000 00	402 OCEANGATE, SUITE 510, LONG BEACH, CA 90802	Public Charity	SUPPORT SHERIFF'S YOUTH PROGRAM
Silicon Valley Community Foundation - Sheriff's Youth Program Fund	3,500 00	2011 CRYSTAL DRIVE, SUITE 500, ARLINGTON, VA 22202	Public Charity	SUPPORT LIFE GUARD TRAINING IN ECUADOR
Long Beach - Mantra Sister Cities	250,000 00	1030 15TH ST NW SUITE 200 EAST WASHINGTON, D C 20005	Public Charity	SUPPORT CARE FOR NATURE DEFINING STRENGTHS OF THE AMERICAN PRIVATE SECTOR INGENUITY, INNOVATION, AND EFFICIENCY
Conservation International	25,000 00	326 GALVEZ STREET, STANFORD, CA 94305- 6105	Public Charity	SUPPORT RESEARCH IN DOMESTIC POLICY AND INTERNATIONAL AFFAIRS
Business Executives for National Security	100,000 00	326 GALVEZ STREET, STANFORD, CA 94305- 6105	Public Charity	SUPPORT ECONOMIC POLICY RESEARCH
Stanford University - The Hoover Institution	50,000 00	1639 K STREET, NW SUITE 801, WASHINGTON DC 20006	Public Charity	SUPPORT NATIONAL MEMORIAL TO HONOR DWIGHT D. EISENHOWER
Stanford University - Stanford Institute For Economic Policy Research	5,000 00	1000 BROADWAY, OAKLAND, CA 94607	Public Charity	SUPPORT OAKLAND PUBLIC SCHOOLS
Dwight Eisenhower Memorial Commission	15,000 00	124 MOUNT AUBURN STREET CAMBRIDGE, MA 02138-5795	Public Charity	SUPPORT HARVARD BUSINESS SCHOOL
Oakland Schools Foundation	1,000 00	124 MOUNT AUBURN STREET CAMBRIDGE, MA 02138-5795	Public Charity	SUPPORT HARVARD ATHLETICS FOOTBALL SUPPORT GROWTH AND STRENGTHENING OF DEMOCRATIC INSTITUTIONS AROUND THE WORLD
Harvard University - Harvard Business School	10,000 00	DC 20004-1409	Public Charity	SUPPORT HARVARD ATHLETICS
Harvard University - Friends of Harvard Athletics Football	25,000 00	124 MOUNT AUBURN STREET CAMBRIDGE, MA 02138-5795	Public Charity	SUPPORT THERAPEUTIC SPORT CAMPS FOR WOUNDED VETERANS
National Endowment for Democracy	10,000 00	120 SECOND AVE., SUITE 206, PO BOX 6791, KETCHUM, ID 83340	Public Charity	SUPPORT THE AMERICAN EXPERIENCE THROUGH THEATRE AND EDUCATION
Harvard University - Harvard Varsity Club	10,000 00	514 TENTH STREET NW, WASHINGTON, DC 20006	Public Charity	SUPPORT MUSEUM'S EDUCATION PROGRAMS AND EXHIBITIONS
Higher Ground - Boskin Veterans Organization	10,000 00	216 O STREET, SACRAMENTO, CA 95814 WOUNDED WARRIOR CENTER BLDG 1H9, SANTA MARGARITA ROAD CAMP PENDLETON, CA 92055	Public Charity	SUPPORT INJURED AND CRITICALLY ILL SERVICE MEMBERS
Fords Theatre	25,000 00	ONE WATERFOWL WAY, MEMPHIS, TN 38120- 2351	Public Charity	SUPPORT HABITAT CONSERVATION AND RESEARCH
Crocker Art Museum	5,000 00	1530 P STREET NW, WASHINGTON, DC 20005 888 SEVENTEENTH STREET NW, SUITE 306, WASHINGTON, DC 20006-3312	Public Charity	SUPPORT SCIENTIFIC RESEARCH SUPPORT THE ROLE OF AMERICAN AMBASSADOR AND THE COUNTRY TEAM IN CARRYING OUT US FOREIGN POLICY AT EMBASSIES AROUND THE WORLD
Semper Fi Fund	1,000 00	1111 19TH STREET, NW, SUITE 406 WASHINGTON, DC 20036	Public Charity	SUPPORT COMPREHENSIVE ENERGY REFORM
Ducks Unlimited	2,000 00	888 SEVENTEENTH STREET NW, SUITE 306, WASHINGTON, DC 20006 3312	Public Charity	SUPPORT DEVELOP SOLUTIONS TO PRESSING POLICY ISSUES
Carnegie Institution for Science	1,000 00	2011 CRYSTAL DRIVE, SUITE 500, ARLINGTON, VA 22202	Public Charity	SUPPORT CARE FOR NATURE
Council of American Ambassadors	171,525 00	1111 NORTH CHERRY AVENUE, PO BOX 210109, TUCSON, AZ 85721-0109	Public Charity	SUPPORT WILLIAM GRAMA ENDOWMENT IN ORTHOPAEDIC SURGERY
Securing Americas Future Energy	101,120 00	2011 CRYSTAL DRIVE, SUITE 500, ARLINGTON, VA 22202	Public Charity	SUPPORT CARE FOR NATURE
George W Bush Presidential Center	85,098 00			
Conservation International				
University of Arizona Foundation				
Conservation International				
Total	\$ 1,020,743			



2013 Informational Tax Reporting Statement

STEPHENSON FOUNDATION

Account No Y89-891371 Customer Service: 800-544-5704
Recipient ID No. 94-3320092 Payer's Fed ID Number 04-3523567

Note: This information is not reported to the IRS. It may assist you in tax return preparation.

2013 Proceeds from Broker and Barter Exchange Transactions*

Short-term transactions

(IRS Form 1099-B box numbers are shown below in bold type)

8 Description, 1d Stock or Other Symbol, CUSIP	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc. (b)	3 Cost or Other Basis (a)	Gain/Loss (-)	5 Wash Sale Loss Disallowed	4 Federal Income Tax Withheld	13 State Tax Withheld	15 State Tax Withheld
ARDEN ALTERNATIVE STRATEGIES CLASS I, ARDNX, 039786306										
Sale	03/12/13	11/29/12	83.739	860.00	842.56	17.44				
Sale	06/11/13	11/29/12	81.951	840.00	824.57	15.43				
Subtotals				1,700.00	1,667.13					
FIDELITY SHORT TERM BOND, FSHBX, 316146208										
Sale	03/12/13	02/20/13	221.047	1,901.00	1,901.00	0.00				
Sale	06/11/13	02/20/13	215.967	1,853.00	1,857.32	-4.32	0.53			
Sale	08/05/13	02/20/13	2,648.775	22,700.00	22,779.38	-79.38	0.76			
Sale	10/11/13	02/20/13	2,100.350	18,000.00	18,062.93	-62.93	0.81			
Sale	11/06/13	02/20/13	2,817.229	24,200.00	24,228.18	-28.18	0.10			
Subtotals				68,654.00	68,828.81		2.20			
FRANKLIN GOLD AND PRECIOUS METALS CL A, FKRCX, 353535107										
Sale	03/12/13	02/20/13	32.997	850.00	848.02	1.98				
Sale	03/19/13	02/20/13	963.339	24,700.00	24,757.81	-57.81				
Sale	05/06/13	02/20/13	1,225.613	24,500.00	31,498.25	-6,998.25				
Sale	05/21/13	02/20/13	592.430	10,800.00	15,225.45	-4,425.45				
Sale	05/23/13	02/20/13	477.450	8,742.11	12,270.47	-3,528.36				
Subtotals				69,592.11	84,600.00					
METROPOLITAN WEST LOW DURATION M, MWLDX, 592905202										
Sale	02/19/13	various	514.072	4,539.28	4,446.67	92.61				

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Recipient ID No 94-3320092 Payer's Fed ID Number: 04-3523567

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2013 Proceeds from Broker and Barter Exchange Transactions*

Short-term transactions

(IRS Form 1099-B box numbers are shown below in bold type)

8 Description, 1d Stock or Other Symbol, CUSIP							
Action	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc (b)	3 Cost or Other Basis (a)	Gain/Loss (-)	5 Wash Sale Loss Disallowed
TOTALS				144,485.39	159,542.61	127.46	
Short-Term Realized Gain						-15,184.68	
Short-Term Realized Loss							2.20
Wash Sale Loss Disallowed							
							0.00
							13 State Tax Withheld
							4 Federal Income Tax Withheld

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2013 Informational Tax Reporting Statement

STEPHENSON FOUNDATION
Account No. Y89-991371 Customer Service 800-544-5704
Recipient ID No 94-3320092 Payer's Fed ID Number: 04-3523567

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2013 Proceeds from Broker and Barter Exchange Transactions*

Long-term transactions

(IRS Form 1099-B box numbers are shown below in bold type)

8 Description, 1d Stock or Other Symbol, CUSIP	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc. (b)	3 Cost or Other Basis (a)	Gain/Loss (-)	5 Wash Sale Loss Disallowed	4 Federal Income Tax Withheld	13 State Tax Withheld	15 State Tax Withheld
FIDELITY SELECT GOLD, FSAGX, 316390780										
Sale	01/24/13	06/01/10	506.795	17,900.00	23,515.79	-5,615.79				
Sale	02/19/13	various	1,845.689	58,969.75	85,641.77	-26,672.02				
Sale	02/19/13	01/12/12	452.027	14,442.28	20,400.00	-5,957.72				
Subtotals				91,312.03	129,557.56					
FIDELITY TOTAL BOND, FTBFX, 31617K881										
Sale	02/20/13	06/01/10	27,847.286	302,700.00	299,782.72	2,917.28				
Sale	03/12/13	06/01/10	278.933	3,032.00	3,002.78	29.22				
Sale	05/21/13	06/01/10	2,799.634	30,600.00	30,138.73	461.27				
Sale	06/11/13	06/01/10	245.853	2,638.00	2,646.67	-8.67	3.87			
Subtotals				338,970.00	335,570.90		3.87			
MERGER FUND, MERFX, 589509108										
Sale	02/19/13	various	5,054.678	79,712.26	80,506.11	-793.85				
Sale	02/19/13	10/19/10	103.321	1,629.38	1,632.16	-2.78				
Subtotals				81,341.64	82,138.27					
METROPOLITAN WEST LOW DURATION M, MWLDX, 592905202										
Sale	02/19/13	various	11,213.044	99,011.16	93,196.48	5,814.68				
Sale	02/19/13	01/31/12	66.519	587.36	575.38	11.98				
Subtotals				99,598.52	93,771.86					
PIMCO SHORT TERM ADMINISTRATIVE SHS, PSFAX, 693390734										
Sale	01/24/13	06/01/10	1,789.687	17,700.00	17,628.17	71.83				
Sale	03/12/13	06/01/10	129.858	1,283.00	1,279.08	3.92				

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2013 Informational Tax Reporting Statement

STEPHENSON FOUNDATION
Account No. Y89-891371 Customer Service: 800-544-5704
Recipient ID No. 94-3320092 Payer's Fed ID Number. 04-3523567

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2013 Proceeds from Broker and Barter Exchange Transactions*

Long-term transactions

(IRS Form 1099-B box numbers are shown below in bold type)

8 Description, 1d Stock or Other Symbol, CUSIP	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc (b)	3 Cost or Other Basis (a)	Gain/Loss (-)	5 Wash Sale Disallowed	4 Federal Income Tax Withheld	13 State Tax Withheld
PIMCO SHORT TERM ADMINISTRATIVE SHS, PSFAX, 693390734									
Sale	03/19/13	various	4,007.522	39,634.39	39,473.55	160.84			
Sale	03/19/13	06/01/10	26.856	265.61	265.10	0.51			
Sale	06/11/13	06/08/10	86.207	850.00	849.13	0.87			
Sale	10/11/13	various	2,149.488	21,172.45	21,172.17	0.28			
Sale	10/11/13	various	53.558	527.55	528.55	-1.00	0.18		
Sale	12/10/13	various	6,105.289	60,259.20	60,136.27	122.93			
Sale	12/10/13	various	9.406	92.84	92.84	0.00			
Subtotals				141,785.04	141,424.86		0.18		
PIMCO TOTAL RETURN ADMINISTRATIVE SHS, PTRAX, 693390726									
Sale	02/20/13	06/01/10	18,016.086	201,600.00	200,449.52	1,150.48			
Sale	03/12/13	06/01/10	193.393	2,166.00	2,151.72	14.28			
Sale	05/21/13	06/01/10	3,051.601	34,300.00	33,952.54	347.46			
Sale	06/11/13	06/01/10	159.344	1,748.00	1,772.88	-24.88	9.74		
Subtotals				239,814.00	238,326.66		9.74		
STRATEGIC ADVISERS CORE FUND, FCSAX, 31635R504									
Sale	01/24/13	06/01/10	1,482.353	18,900.00	14,782.24	4,117.76			
Sale	03/12/13	06/01/10	881.941	11,721.00	8,794.84	2,926.16			
Sale	05/21/13	06/01/10	1,917.425	27,400.00	19,120.84	8,279.16			
Sale	06/11/13	06/01/10	862.527	12,015.00	8,601.25	3,413.75			
Sale	06/25/13	06/01/10	2,292.432	31,200.00	22,860.47	8,339.53			

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2013 Informational Tax Reporting Statement

STEPHENSON FOUNDATION Account No. Y89-891371 Customer Service. 800-544-5704
Recipient ID No. 94-3320092 Payer's Fed ID Number 04-3523567

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2013 Proceeds from Broker and Barter Exchange Transactions*

Long-term transactions

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STRATEGIC ADVISERS CORE FUND, FCSAX, 31635R504									
Sale	07/23/13	06/01/10	1,979.914	27,600.00	19,743.99	7,856.01			
Sale	08/05/13	06/01/10	2,017.045	28,400.00	20,114.27	8,285.73			
Subtotals				157,236.00	114,017.90				
STRATEGIC ADVISERS CORE INCOME FUND, FPCIX, 31635R884									
Sale	02/20/13	various	21,108.033	228,600.00	222,307.71	6,292.29			
Sale	03/12/13	04/13/11	590.498	6,401.00	6,219.07	181.93			
Sale	06/11/13	04/13/11	694.549	7,390.00	7,314.92	75.08			
Subtotals				242,391.00	235,841.70				
STRATEGIC ADVISERS EMERGING MARKETS, FSAMX, 31635R801									
Sale	01/24/13	10/21/10	1,785.714	18,000.00	18,340.67	-340.67	4.38		
Sale	03/12/13	10/21/10	186.965	1,879.00	1,920.28	-41.28	41.28		
Sale	06/11/13	10/21/10	230.076	2,119.00	2,363.06	-244.06			
Sale	07/23/13	10/21/10	3,130.990	29,400.00	32,157.69	-2,757.69			
Sale	10/11/13	various	2,596.618	25,810.39	26,669.28	-858.89			
Sale	10/11/13	10/21/10	250.464	2,489.61	2,361.90	127.71			
Subtotals				79,698.00	83,812.88		45.66		
STRATEGIC ADVISERS GROWTH FUND, FSGFX, 31635R603									
Sale	03/12/13	08/09/10	726.433	10,141.00	7,741.61	2,399.39			
Sale	03/19/13	08/09/10	1,415.162	19,600.00	15,081.40	4,518.60			
Sale	05/21/13	08/09/10	1,447.543	21,800.00	15,426.49	6,373.51			
Sale	06/11/13	08/09/10	684.131	10,002.00	7,290.79	2,711.21			

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Recipient ID No. 94-3320092 Payer's Fed ID Number 04-3523567

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2013 Proceeds from Broker and Barter Exchange Transactions*

Long-term transactions

(IRS Form 1099-B box numbers are shown below in bold type)

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STRATEGIC ADVISERS GROWTH FUND, FSGFX, 31635R603									
Sale	10/11/13	08/09/10	2,598.007	39,100.00	27,687.00	11,413.00			
Sale	12/10/13	08/09/10	71.479	1,147.96	761.75	386.21			
Subtotals				101,790.96	73,989.04				
STRATEGIC ADVISERS INCOME OPPORTUNITIES, FPIOX, 31635R876									
Sale	01/24/13	08/09/10	3,541.463	36,300.00	33,705.31	2,594.69			
Sale	03/12/13	08/09/10	378.752	3,886.00	3,604.71	281.29			
Sale	03/19/13	various	3,764.591	38,700.00	35,828.90	2,871.10			
Sale	06/11/13	09/20/10	338.993	3,434.00	3,226.31	207.69			
Sale	12/10/13	09/20/10	97.087	1,000.00	924.01	75.99			
Subtotals				83,320.00	77,289.24				
STRATEGIC ADVISERS INTERNATIONAL FUND, FILFX, 31635R868									
Sale	03/12/13	06/01/10	1,697.204	15,953.72	13,152.81	2,800.91			
Sale	06/11/13	06/01/10	1,852.769	17,731.00	14,358.39	3,372.61			
Sale	07/23/13	06/01/10	2,291.457	22,800.00	17,758.08	5,041.92			
Sale	09/10/13	06/01/10	8,612.205	87,500.00	66,741.92	20,758.08			
Subtotals				143,984.72	112,011.20				
STRATEGIC ADVISERS SHORT DURATION FUND, FAUDX, 31635R769									
Sale	03/12/13	01/24/12	432.376	4,367.00	4,347.56	19.44			
Sale	06/11/13	01/24/12	477.160	4,805.00	4,800.66	4.34			
Sale	06/25/13	01/24/12	2,440.239	24,500.00	24,550.98	-50.98	50.98		

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2013 Proceeds from Broker and Barter Exchange Transactions*

Long-term transactions

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STRATEGIC ADVISERS SHORT DURATION FUND, FAUDX, 31635R769										
Sale		08/05/13	01/24/12	3,223.881	32,400.00	32,438.35	-38.35	4.93		
Sale		10/11/13	01/24/12	2,713.718	27,300.00	27,305.41	-5.41	0.10		
Subtotals					93,372.00	93,442.96		56.01		
STRATEGIC ADVISERS SMALL-MID CAP FD, FSCFX, 31635R843										
Sale		03/12/13	06/01/10	284.019	3,590.00	2,708.02	881.98			
Sale		06/11/13	06/01/10	295.166	3,725.00	2,814.30	910.70			
Sale		12/10/13	06/01/10	691.085	10,000.00	6,589.25	3,410.75			
Subtotals					17,315.00	12,111.57				
STRATEGIC ADVISERS US OPPTY FUND, FUSOX, 31635R835										
Sale		03/12/13	06/01/10	436.011	4,831.00	3,699.97	1,131.03			
Sale		06/11/13	06/01/10	436.372	4,979.00	3,703.03	1,275.97			
Sale		12/10/13	06/01/10	387.898	5,000.00	3,291.69	1,708.31			
Subtotals					14,810.00	10,694.69				
STRATEGIC ADVISERS VALUE FUND, FVSAX, 31635R702										
Sale		01/24/13	06/01/10	1,661.238	25,500.00	20,190.03	5,309.97			
Sale		03/12/13	06/01/10	633.438	10,135.00	7,698.55	2,436.45			
Sale		06/11/13	06/01/10	624.171	10,536.00	7,585.93	2,950.07			
Sale		11/06/13	06/01/10	1,300.949	23,300.00	15,811.22	7,488.78			
Subtotals					69,471.00	51,285.73				

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Recipient ID No 94-3320092 Payer's Fed ID Number 04-3523567

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2013 Proceeds from Broker and Barter Exchange Transactions

Long-term transactions

(IRS Form 1099-B box numbers are shown below in bold type)

8 Description, 1d Stock or Other Symbol, CUSIP	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc. (b)	3 Cost or Other Basis (a)	Gain/Loss (-)	5 Wash Sale Loss Disallowed	4 Federal Income Tax Withheld	13 State Tax Withheld
TEMPLETON GLOBAL BOND CLASS A, TPINX, 880208103									
Sale	03/12/13	06/01/10	97.054	1,318.00	1,253.77	64.23			
Sale	06/11/13	06/01/10	96.549	1,259.00	1,247.25	11.75			
Subtotals				2,577.00	2,501.02				
TOTALS				1,998,786.91	1,887,788.04				0.00
Long-Term Realized Gain						154,412.91			
Long-Term Realized Loss						-43,414.04			
Wash Sale Loss Disallowed							115.46		

In addition to this Informational Tax Reporting Statement, please see the 1099 Tax Reporting Statement that we have issued for your account. Only the 1099 Statement includes your official IRS Form 1099-B for the lots that cost basis information is required to be reported to the IRS.

(a) Cost or other basis provided may include adjustments including, but not limited to, dividend reinvestment, return of capital/principal, wash sale loss disallowed, amortization, accretion, acquisition premium, bond premium, market discount, market premium, and option premium.

(b) Gross proceeds less commissions

*Our records indicate that you are an exempt recipient for 1099 reporting purposes. This statement provided is based on IRS information reporting requirements for individuals as of the preparation date and is NOT furnished to the IRS. You may be subject to different income tax reporting requirements. Please contact your tax advisor if you have any questions.

2013 Tax Information Statement

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CAPITAL GUARDIAN TRUST COMPANY
C/O PCS TAX, 6455 IRVINE CENTER DR, C-2B
IRVINE, CA 92618

Account Number: 44-150800
Recipient's Tax ID Number: XX-XXX0092
☐ Corrected ☐ 2nd TIN notice

Recipient's Name and Address:
THE STEPHENSON FOUNDATION
THOMAS F & BARBARA U STEPHENSON
DIRECTORS OF THE FDN
198 FAIR OAKS LANE
ATHERTON, CA 94027

2013 Proceeds from Broker and Barter Exchange Transactions

Sales are listed at Gross Proceeds less commissions and option premiums.

Cusip	Description	Date of Sale or Exchange	Date of Acquisition	Stock or Other Symbol	Stocks Bonds, etc.	Cost or Other Basis	Wash Sale Loss Disallowed	Net Gain or Loss	Federal Income Tax Withheld	State Tax Withheld
Short Term Sales										
00846U101	AGILENT TECHNOLOGIES INC			A						
200.0000	06/26/2013	02/14/2013		CAE.CN	8,521.17	8,918.60	0.00	-397.43	0.00	0.00
124765959	CAE INC C\$			CAE.CN						
200.0000	10/24/2013	02/08/2013		CAE.CN	2,199.94	2,173.87	0.00	26.07	0.00	0.00
124765959	CAE INC C\$			CAE.CN						
500.0000	10/24/2013	Various		CCBPX	5,513.05	5,432.01	0.00	81.04	0.00	0.00
14042Y304	CAPITAL GROUP CORE BOND FUND			CCBPX						
2992.3720	10/15/2013	Various		1088.HK	30,492.27	31,270.28	0.00	-778.01	0.00	0.00
B09N7M905	CHINA SHENHUA ENERGY			1088.HK						
1500.0000	03/27/2013	09/10/2012		1088.HK	5,526.67	5,640.32	0.00	-113.65	0.00	0.00
B09N7M905	CHINA SHENHUA ENERGY			1088.HK						
1000.0000	03/28/2013	09/11/2012		1088.HK	3,617.33	3,736.50	0.00	-119.17	0.00	0.00
B09N7M905	CHINA SHENHUA ENERGY			1088.HK						
1000.0000	04/03/2013	Various		1088.HK	3,623.24	3,618.80	0.00	4.44	0.00	0.00
B09N7M905	CHINA SHENHUA ENERGY			1088.HK						
1000.0000	04/05/2013	09/06/2012		DBS.SP	3,551.37	3,501.11	0.00	50.26	0.00	0.00
617520903	DBS GROUP HOLDINGS LTD			DBS.SP						
3270	07/23/2013	06/27/2013			4.26	4.51	0.00	-0.25	0.00	0.00

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Account Number: 44-150800

Recipient's Tax ID Number: XX-XXX0092

☐ Corrected ☐ 2nd TIN notice

CAPITAL GUARDIAN TRUST COMPANY
C/O PCS TAX, 6455 IRVINE CENTER DR, C-2B
IRVINE, CA 92618

Sales are listed at Gross Proceeds less commissions and option premiums.

Cusip	Description	Date of Sale or Exchange	Date of Acquisition	Stock or Other Symbol	Cost or Other Basis	Wash Sale Loss Disallowed	Net Gain or Loss	Federal Income Tax Withheld	State Tax Withheld
292505955	ENCANA CORP	01/11/2013	02/29/2012	ECA.CN	3,973.31	0.00	-115.58	0.00	0.00
200.0000					4,088.89				
292505955	ENCANA CORP	01/14/2013	02/28/2012	ECA.CN	3,896.60	0.00	-117.66	0.00	0.00
200.0000					4,014.26				
G3157S106	ENSCO PLC-CL A	05/21/2013	02/19/2013	ESV	4,756.01	0.00	-150.18	0.00	0.00
75.0000					4,906.19				
494568101	KINDER MORGAN INC	11/12/2013	Various	KMI	29,386.53	0.00	-476.37	0.00	0.00
850.0000					29,862.90				
628625907	LI & FUNG LTD	12/12/2013	09/27/2013	494.HK	9,973.50	0.00	-1,805.68	0.00	0.00
8000.0000					11,779.18				
057580003	MEGGITT PLC	10/22/2013	07/11/2013	MGTT.LN	3.63	0.00	0.10	0.00	0.00
4190					3.53				
659678007	MITSUBISHI CORP	04/09/2013	03/11/2013	6596785	7,027.12	0.00	-675.20	0.00	0.00
400.0000					7,702.32				
61945C103	MOSAIC CO/THE	12/12/2013	Various	MOS	13,202.35	0.00	-4,639.66	0.00	0.00
300.0000					17,842.01				
61945C103	MOSAIC CO/THE	12/13/2013	Various	MOS	8,791.46	0.00	-2,773.05	0.00	0.00
200.0000					11,564.51				

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Cusip	Description	Date of Sale or Exchange	Stock or Other Symbol	Stocks Bonds, etc.	Cost or Other Basis	Wash Sale Loss Disallowed	Net Gain or Loss	Federal Income Tax Withheld	State Tax Withheld
670851203	OI SA PN ADR	01/23/2013	Various	4,034.90	5,172.98	0.00	-1,138.08	0.00	0.00
1000.0000									
670851203	OI SA PN ADR	01/23/2013	Various	4,438.28	5,451.57	0.00	-1,013.29	0.00	0.00
1100.0000									
071887004	RIO TINTO PLC REG	03/21/2013	02/14/2013	4,761.20	5,939.46	0.00	-1,178.26	0.00	0.00
100.0000									
484628904	SAP AG	10/17/2013	05/21/2013	3,964.29	4,314.68	0.00	-350.39	0.00	0.00
54.0000									
483410007	SCHNEIDER ELECTRIC SA	07/16/2013	06/10/2013	4,629.88	5,103.21	0.00	-473.33	0.00	0.00
64.0000									
483410007	SCHNEIDER ELECTRIC SA	07/17/2013	06/10/2013	2,316.59	2,551.60	0.00	-235.01	0.00	0.00
32.0000									
867C2G906	SWIRE PROPERTIES LTD	11/01/2013	12/03/2012	26,765.05	32,311.65	0.00	-5,546.60	0.00	0.00
9800.0000									
Total Short Term Sales				194,970.00	216,904.94	0.00	-21,934.94	0.00	0.00
Long Term Sales									
001055102	AFLAC INC	03/15/2013	11/22/2011	5,097.69	4,098.78	0.00	998.91	0.00	0.00
100.0000									

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44-150800

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Cusip	Description	Date of Sale or Exchange	Stock or Other Symbol	Stocks, Bonds, etc.	Cost or Other Basis	Wash Sale Loss Disallowed	Net Gain or Loss	Federal Income Tax Withheld	State Tax Withheld
001055102	AFLAC INC	03/18/2013	AFL	5,045.49	4,061.07	0.00	984.42	0.00	0.00
100.0000		11/22/2011							
001055102	AFLAC INC	03/18/2013	AFL	5,035.38	3,988.41	0.00	1,046.97	0.00	0.00
100.0000		11/23/2011							
00846U101	AGILENT TECHNOLOGIES INC	06/26/2013	A	4,260.58	4,467.14	0.00	-206.56	0.00	0.00
100.0000		02/07/2012							
00846U101	AGILENT TECHNOLOGIES INC	06/27/2013	A	4,278.69	4,467.14	0.00	-188.45	0.00	0.00
100.0000		02/07/2012							
601090004	AJINOMOTO CO INC	05/21/2013	2802.JP	14,488.90	11,814.46	0.00	2,674.44	0.00	0.00
1000.0000		03/14/2012							
018490102	ALLERGAN INC	06/03/2013	AGN	9,838.17	6,954.78	0.00	2,883.39	0.00	0.00
100.0000		01/07/2011							
018490102	ALLERGAN INC	06/04/2013	AGN	9,894.10	6,954.78	0.00	2,939.32	0.00	0.00
100.0000		01/07/2011							
018490102	ALLERGAN INC	06/05/2013	AGN	9,756.06	6,954.78	0.00	2,801.28	0.00	0.00
100.0000		01/07/2011							
018490102	ALLERGAN INC	06/06/2013	AGN	9,853.70	6,954.78	0.00	2,898.92	0.00	0.00
100.0000		01/07/2011							

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CAPITAL GUARDIAN TRUST COMPANY
C/O PCS TAX, 6455 IRVINE CENTER DR, C-2B
IRVINE, CA 92618

Sales are listed at Gross Proceeds less commissions and option premiums.

Cusip	Description	Date of Sale or Exchange	Date of Acquisition	Stock or Other Symbol	Cost or Other Basis	Wash Sale Loss Disallowed	Net Gain or Loss	Federal Income Tax Withheld	State Tax Withheld
018490102	ALLERGAN INC			AGN					
50.0000	09/25/2013	01/07/2011		4,575.67	3,477.39	0.00	1,098.28	0.00	0.00
B1WVF6905	ANDRITZ AG			ANDR.AV					
52.0000	04/10/2013	08/16/2011		3,532.96	2,403.72	0.00	1,129.24	0.00	0.00
B1WVF6905	ANDRITZ AG			ANDR.AV					
140.0000	04/10/2013	Various		9,473.47	6,467.07	0.00	3,006.40	0.00	0.00
B1WVF6905	ANDRITZ AG			ANDR.AV					
86.0000	06/27/2013	Various		4,453.43	3,907.36	0.00	546.07	0.00	0.00
B15456906	BANK OF CHINA LTD H			3988.HK					
25600.0000	02/08/2013	01/10/2011		12,289.85	13,714.21	0.00	-1,424.36	0.00	0.00
067901959	BARRICK GOLD CORP C\$			ABX.CN					
550.0000	03/18/2013	Various		15,855.08	27,248.17	0.00	-11,393.09	0.00	0.00
067901959	BARRICK GOLD CORP C\$			ABX.CN					
350.0000	08/07/2013	01/07/2011		5,519.38	17,150.73	0.00	-11,631.35	0.00	0.00
087628905	BG GROUP PLC			0876289					
200.0000	06/07/2013	01/10/2011		3,624.78	4,141.88	0.00	-517.10	0.00	0.00
087628905	BG GROUP PLC			0876289					
200.0000	06/10/2013	01/10/2011		3,652.16	4,141.88	0.00	-489.72	0.00	0.00

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2013 Tax Information Statement

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Account Number: 44-150800

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CAPITAL GUARDIAN TRUST COMPANY
C/O PCS TAX, 6455 IRVINE CENTER DR, C-2B
IRVINE, CA 92618

Sales are listed at Gross Proceeds less commissions and option premiums.

Cusip	Description	Date of Sale or Exchange	Date of Acquisition	Stock or Other Symbol	Cost or Other Basis	Wash Sale Loss Disallowed	Net Gain or Loss	Federal Income Tax Withheld	State Tax Withheld
087628905	BG GROUP PLC	06/14/2013	01/10/2011	0876289	4,141.88	0.00	-430.34	0.00	0.00
200.0000									
087628905	BG GROUP PLC	06/18/2013	01/10/2011	0876289	2,070.94	0.00	-231.12	0.00	0.00
100.0000									
087628905	BG GROUP PLC	07/12/2013	01/10/2011	0876289	4,141.88	0.00	-581.89	0.00	0.00
200.0000									
087628905	BG GROUP PLC	08/29/2013	01/10/2011	0876289	4,141.87	0.00	-249.24	0.00	0.00
200.0000									
087628905	BG GROUP PLC	09/02/2013	01/10/2011	0876289	2,070.94	0.00	-154.78	0.00	0.00
100.0000									
614469005	BHP BILLITON LTD (AUD)	05/27/2013	01/10/2011	6144690	14,870.00	0.00	-3,765.86	0.00	0.00
338.0000									
111320107	BROADCOM CORP	11/04/2013	Various	BRCM	17,081.47	0.00	-3,805.06	0.00	0.00
500.0000									
124765959	CAE INC C\$	10/21/2013	Various	CAE.CN	6,743.56	0.00	-1,324.40	0.00	0.00
500.0000									
124765959	CAE INC C\$	10/22/2013	Various	CAE.CN	8,081.67	0.00	-1,537.11	0.00	0.00
600.0000									

2013 Tax Information Statement

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198 FAIR OAKS LANE
ATHERTON, CA 94027

Account Number: 44-150800

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IRVINE, CA 92618

Sales are listed at Gross Proceeds less commissions and option premiums.

Cusip	Description	Date of Sale or Exchange	Stock or Other Symbol	Stocks Bonds, etc.	Cost or Other Basis	Wash Sale Loss Disallowed	Net Gain or Loss	Federal Income Tax Withheld	State Tax Withheld
124765959	CAE INC C\$		CAE.CN						
300.0000	10/22/2013	07/05/2011		3,271.21	4,033.37	0.00	-762.16	0.00	0.00
124765959	CAE INC C\$		CAE.CN						
900.0000	10/23/2013	Various		9,807.72	11,911.70	0.00	-2,103.98	0.00	0.00
124765959	CAE INC C\$		CAE.CN						
600.0000	10/23/2013	Various		6,606.59	7,967.64	0.00	-1,361.05	0.00	0.00
124765959	CAE INC C\$		CAE.CN						
600.0000	10/24/2013	Various		6,599.82	7,931.04	0.00	-1,331.22	0.00	0.00
14042Y304	CAPITAL GROUP CORE BOND FUND		CCBPX						
55888.8840	10/15/2013	Various		569,507.73	558,990.06	0.00	10,517.67	0.00	0.00
143658300	CARNIVAL CORP COMMON PAIRED STOCK		CCL						
600.0000	07/01/2013	Various		20,788.08	19,347.93	0.00	1,440.15	0.00	0.00
143658300	CARNIVAL CORP COMMON PAIRED STOCK		CCL						
200.0000	08/19/2013	01/20/2012		7,196.19	6,285.50	0.00	910.69	0.00	0.00
143658300	CARNIVAL CORP COMMON PAIRED STOCK		CCL						
200.0000	08/20/2013	Various		7,211.78	6,241.73	0.00	970.06	0.00	0.00
143658300	CARNIVAL CORP COMMON PAIRED STOCK		CCL						
100.0000	08/20/2013	08/25/2011		3,606.57	3,039.76	0.00	566.81	0.00	0.00

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2013 Tax Information Statement

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Account Number: 44-150800
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CAPITAL GUARDIAN TRUST COMPANY
 C/O PCS TAX, 6455 IRVINE CENTER DR, C-2B
 IRVINE, CA 92618

Sales are listed at Gross Proceeds less commissions and option premiums.

Cusip	Description	Date of Sale or Exchange	Quantity Sold	Stocks or Other Symbol	Cost or Other Basis	Wash Sale Loss Disallowed	Net Gain or Loss	Federal Income Tax Withheld	State Tax Withheld
15135U950	CENOVUS ENERGY INC C\$	12/11/2013	100.0000	CVE CN	3,207.30	0.00	-310.60	0.00	0.00
15135U950	CENOVUS ENERGY INC C\$	12/11/2013	100.0000	CVE CN	3,207.30	0.00	-335.78	0.00	0.00
15135U950	CENOVUS ENERGY INC C\$	12/12/2013	200.0000	CVE CN	6,414.60	0.00	-772.15	0.00	0.00
15135U950	CENOVUS ENERGY INC C\$	12/12/2013	200.0000	CVE CN	6,414.60	0.00	-782.61	0.00	0.00
15135U950	CENOVUS ENERGY INC C\$	12/13/2013	200.0000	CVE CN	6,414.60	0.00	-786.09	0.00	0.00
15135U950	CENOVUS ENERGY INC C\$	12/16/2013	300.0000	CVE CN	9,621.90	0.00	-1,152.05	0.00	0.00
15135U950	CENOVUS ENERGY INC C\$	12/17/2013	200.0000	CVE CN	6,414.59	0.00	-856.45	0.00	0.00
15135U109	CENOVUS ENERGY INC US\$	09/26/2013	200.0000	CVE	7,095.36	0.00	-1,058.26	0.00	0.00
15135U109	CENOVUS ENERGY INC US\$	09/27/2013	200.0000	CVE	6,444.66	0.00	-430.01	0.00	0.00

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Cusip	Description	Date of Sale or Exchange	Date of Acquisition	Stocks, Bonds, etc.	Cost or Other Basis	Wash Sale Loss Disallowed	Net Gain or Loss	Federal Income Tax Withheld	State Tax Withheld
156782104	CERN CORP	02/07/2013	01/07/2011	CERN	5,912.66	0.00	4,876.58	0.00	0.00
125.0000				10,789.24					
156782104	CERN CORP	02/07/2013	01/07/2011	CERN	14,190.37	0.00	11,705.31	0.00	0.00
300.0000				25,895.68					
684038007	DENSO CORP	02/07/2013	01/07/2011	6902.JP	9,429.80	0.00	2,345.07	0.00	0.00
300.0000				11,774.87					
023740905	DIAGEO PLC	02/12/2013	02/09/2012	DGELN	5,733.09	0.00	3,148.75	0.00	0.00
300.0000				8,881.84					
262037104	DRIL-QUIP INC	02/11/2013	01/10/2011	DRQ	6,470.99	0.00	2,998.65	0.00	0.00
100.0000				9,469.64					
262037104	DRIL-QUIP INC	07/12/2013	09/01/2011	DRQ	6,192.21	0.00	3,273.43	0.00	0.00
100.0000				9,465.64					
262037104	DRIL-QUIP INC	07/17/2013	09/02/2011	DRQ	6,095.05	0.00	3,169.08	0.00	0.00
100.0000				9,264.13					
278865100	ECOLAB INC	07/25/2013	09/06/2011	ECL	9,833.62	0.00	7,447.95	0.00	0.00
200.0000				17,281.57					
278865100	ECOLAB INC	07/01/2013	01/07/2011	ECL	9,833.62	0.00	7,410.17	0.00	0.00
200.0000				17,243.79					

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Sales are listed at Gross Proceeds less commissions and option premiums.

Cusip	Description	Date of Sale or Exchange	Stock or Other Symbol	Cost or Other Basis	Wash Sale Loss Disallowed	Net Gain or Loss	Federal Income Tax Withheld	State Tax Withheld
291011104	EMERSON ELECTRIC CO	10/21/2013	13,142.43	11,359.86	0.00	1,782.57	0.00	0.00
200.0000		01/07/2011	EMR					
291011104	EMERSON ELECTRIC CO	10/22/2013	6,637.99	5,679.93	0.00	958.06	0.00	0.00
100.0000		01/07/2011	EMR					
292505955	ENCANA CORP	01/14/2013	3,896.60	6,490.14	0.00	-2,593.54	0.00	0.00
200.0000		Various	ECA.CN					
292505955	ENCANA CORP	01/15/2013	9,657.10	15,999.52	0.00	-6,342.42	0.00	0.00
500.0000		Various	ECA.CN					
292505955	ENCANA CORP	01/16/2013	5,803.80	9,508.13	0.00	-3,704.33	0.00	0.00
300.0000		Various	ECA.CN					
292505955	ENCANA CORP	01/17/2013	7,725.23	12,416.98	0.00	-4,691.75	0.00	0.00
400.0000		02/17/2011	ECA.CN					
292505955	ENCANA CORP	01/18/2013	5,791.01	9,265.13	0.00	-3,474.12	0.00	0.00
300.0000		03/10/2011	ECA.CN					
292505955	ENCANA CORP	01/22/2013	3,825.84	5,611.51	0.00	-1,785.66	0.00	0.00
200.0000		Various	ECA.CN					
292505955	ENCANA CORP	01/23/2013	3,837.15	4,956.81	0.00	-1,119.66	0.00	0.00
200.0000		09/02/2011	ECA.CN					

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Recipient's Name and Address:

THE STEPHENSON FOUNDATION
THOMAS F & BARBARA U STEPHENSON
DIRECTORS OF THE FDN
198 FAIR OAKS LANE
ATHERTON, CA 94027

Account Number: 44-150800

Recipient's Tax ID Number: XX-XXX0092

☐ Corrected

☐ 2nd TIN notice

CAPITAL GUARDIAN TRUST COMPANY
C/O PCS TAX, 6455 IRVINE CENTER DR, C-2B
IRVINE, CA 92618

Sales are listed at Gross Proceeds less commissions and option premiums.

Cusip	Description	Date of Sale or Exchange	Stock or Other Symbol	Cost or Other Basis	Wash Sale Loss Disallowed	Net Gain or Loss	Federal Income Tax Withheld	State Tax Withheld
292505955	ENCANA CORP		ECA.CN					
100.0000	01/24/2013	09/02/2011	1,941.25	2,478.41	0.00	-537.16	0.00	0.00
335934956	FIRST QUANTUM MINERALS LTD C\$		FM.CN					
6800	04/12/2013	01/07/2011	12.88	15.41	0.00	-2.53	0.00	0.00
B096LW904	FUGRO NV		FUR.NA					
90.0000	02/25/2013	08/12/2011	4,370.91	5,006.95	0.00	-636.04	0.00	0.00
B096LW904	FUGRO NV		FUR.NA					
183.0000	02/27/2013	Various	8,579.61	9,953.04	0.00	-1,373.43	0.00	0.00
B096LW904	FUGRO NV		FUR.NA					
6.0000	03/01/2013	09/22/2011	279.19	307.52	0.00	-28.33	0.00	0.00
B096LW904	FUGRO NV		FUR.NA					
14.0000	03/01/2013	09/22/2011	651.78	717.54	0.00	-65.76	0.00	0.00
B096LW904	FUGRO NV		FUR.NA					
23.0000	03/04/2013	Various	1,066.82	1,178.63	0.00	-111.81	0.00	0.00
B096LW904	FUGRO NV		FUR.NA					
71.0000	03/05/2013	Various	3,337.23	3,602.73	0.00	-265.50	0.00	0.00
369604103	GENERAL ELECTRIC CO (USD)		GE					
1600.0000	07/12/2013	Various	37,765.27	28,295.48	0.00	9,469.79	0.00	0.00

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THE STEPHENSON FOUNDATION
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198 FAIR OAKS LANE
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Cusip	Description	Date of Sale or Exchange	Stock or Other Symbol	Stocks Bonds, etc.	Cost or Other Basis	Wash Sale Loss Disallowed	Net Gain or Loss	Federal Income Tax Withheld	State Tax Withheld
G3922B107	GENPACT LTD		G						
200.0000	02/11/2013 Various			3,348.68	3,165.37	0.00	183.31	0.00	0.00
G3922B107	GENPACT LTD		G						
200.0000	02/11/2013 02/09/2012			3,341.60	3,142.00	0.00	199.60	0.00	0.00
636679003	GENTING SINGAPORE PLC		GENS.SP						
6000.0000	12/04/2013 04/13/2012			7,169.41	8,221.69	0.00	-1,052.28	0.00	0.00
375558103	GILEAD SCIENCES INC		GILD						
500.0000	04/30/2013 Various			25,323.03	12,324.95	0.00	12,998.08	0.00	0.00
375558103	GILEAD SCIENCES INC		GILD						
200.0000	07/02/2013 06/20/2012			10,403.87	5,069.36	0.00	5,334.51	0.00	0.00
375558103	GILEAD SCIENCES INC		GILD						
300.0000	08/23/2013 Various			17,881.06	7,663.88	0.00	10,217.18	0.00	0.00
568743900	HENNES & MAURITZ AB		HMB.SS						
211.0000	02/13/2013 Various			7,701.01	6,898.32	0.00	802.69	0.00	0.00
568743900	HENNES & MAURITZ AB		HMB.SS						
100.0000	02/14/2013 01/23/2012			3,594.69	3,329.03	0.00	265.66	0.00	0.00
568743900	HENNES & MAURITZ AB		HMB.SS						
19.0000	02/15/2013 01/10/2011			683.72	618.27	0.00	65.45	0.00	0.00

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CAPITAL GUARDIAN TRUST COMPANY
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THOMAS F & BARBARA U STEPHENSON
DIRECTORS OF THE FDN
198 FAIR OAKS LANE
ATHERTON, CA 94027

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Cusip	Description	Date of Sale or Exchange	Stock or Other Symbol	Stocks, Bonds, etc.	Cost or Other Basis	Wash Sale Loss Disallowed	Net Gain or Loss	Federal Income Tax Withheld	State Tax Withheld
568743900	HENNES & MAURITZ AB	02/15/2013	HMB.SS	2,158.07	1,952.44	0.00	205.63	0.00	0.00
60.0000		01/10/2011							
568743900	HENNES & MAURITZ AB	03/11/2013	HMB.SS	32,361.85	29,099.74	0.00	3,262.11	0.00	0.00
877.0000		Various							
568743900	HENNES & MAURITZ AB	05/16/2013	HMB.SS	3,529.44	3,544.40	0.00	-14.96	0.00	0.00
101.0000		10/27/2011							
568743900	HENNES & MAURITZ AB	05/16/2013	HMB.SS	11,522.17	11,580.73	0.00	-58.56	0.00	0.00
330.0000		10/27/2011							
642910004	HITACHI	05/01/2013	6501.JP	18,651.80	19,400.18	0.00	-748.38	0.00	0.00
3000.0000		03/30/2012							
642910004	HITACHI	05/02/2013	6501.JP	6,151.88	6,466.72	0.00	-314.84	0.00	0.00
1000.0000		03/30/2012							
642910004	HITACHI	05/07/2013	6501.JP	19,134.58	16,803.44	0.00	2,331.14	0.00	0.00
3000.0000		Various							
643655004	HONG KONG/CHINA GAS	02/07/2013	6436557	13,878.99	9,680.70	0.00	4,198.29	0.00	0.00
5000.0000		01/10/2011							
643655004	HONG KONG/CHINA GAS	02/08/2013	6436557	16,562.03	11,616.85	0.00	4,945.18	0.00	0.00
6000.0000		01/10/2011							

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CAPITAL GUARDIAN TRUST COMPANY
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 IRVINE, CA 92618

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643655004	HONG KONG/CHINA GAS	6436557	4,738.97	3,520.26	0.00	1,218.71	0.00	0.00
2000.0000	09/03/2013 01/10/2011							
643655004	HONG KONG/CHINA GAS	6436557	4,736.88	3,520.25	0.00	1,216.63	0.00	0.00
2000.0000	09/05/2013 01/10/2011							
643655004	HONG KONG/CHINA GAS	6436557	4,652.95	3,520.26	0.00	1,132.69	0.00	0.00
2000.0000	09/11/2013 01/10/2011							
643655004	HONG KONG/CHINA GAS	6436557	4,661.78	3,520.25	0.00	1,141.53	0.00	0.00
2000.0000	09/12/2013 01/10/2011							
643655004	HONG KONG/CHINA GAS	6436557	1,111.21	827.26	0.00	283.95	0.00	0.00
470.0000	09/13/2013 01/10/2011							
054052907	HSBC HOLDINGS PLC UKP	0540528	12,665.01	11,960.18	0.00	704.83	0.00	0.00
1132.0000	07/19/2013 01/10/2011							
054052907	HSBC HOLDINGS PLC UKP	0540528	23,906.25	23,085.68	0.00	820.57	0.00	0.00
2185.0000	10/17/2013 01/10/2011							
054052907	HSBC HOLDINGS PLC UKP	0540528	3,774.45	3,655.67	0.00	118.78	0.00	0.00
346.0000	10/17/2013 01/10/2011							
054052907	HSBC HOLDINGS PLC UKP	0540528	98.19	95.09	0.00	3.10	0.00	0.00
9.0000	10/18/2013 01/10/2011							

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198 FAIR OAKS LANE
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CAPITAL GUARDIAN TRUST COMPANY
C/O PCS TAX, 6455 IRVINE CENTER DR, C-2B
IRVINE, CA 92618

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Cusip	Description	Date of Sale or Exchange	Stock or Other Symbol	Stocks, Bonds, etc.	Cost or Other Basis	Wash Sale Loss Disallowed	Net Gain or Loss	Federal Income Tax Withheld	State Tax Withheld
45104G104	ICICI BANK LTD SPON ADR		IBN						
100.0000	07/01/2013	01/07/2011		3,900.24	4,608.00	0.00	-707.76	0.00	0.00
45104G104	ICICI BANK LTD SPON ADR		IBN						
100.0000	07/02/2013	01/07/2011		3,904.75	4,608.00	0.00	-703.25	0.00	0.00
45104G104	ICICI BANK LTD SPON ADR		IBN						
200.0000	07/03/2013	01/07/2011		7,457.55	9,216.00	0.00	-1,758.45	0.00	0.00
45104G104	ICICI BANK LTD SPON ADR		IBN						
300.0000	07/08/2013	01/07/2011		10,993.78	13,824.00	0.00	-2,830.22	0.00	0.00
45104G104	ICICI BANK LTD SPON ADR		IBN						
100.0000	07/24/2013	01/07/2011		3,468.95	4,608.00	0.00	-1,139.05	0.00	0.00
45104G104	ICICI BANK LTD SPON ADR		IBN						
200.0000	07/25/2013	Various		6,992.98	9,057.50	0.00	-2,064.53	0.00	0.00
45104G104	ICICI BANK LTD SPON ADR		IBN						
100.0000	07/25/2013	02/23/2011		3,498.08	4,428.54	0.00	-930.46	0.00	0.00
45104G104	ICICI BANK LTD SPON ADR		IBN						
100.0000	07/26/2013	08/29/2011		3,433.46	3,744.81	0.00	-311.35	0.00	0.00
45104G104	ICICI BANK LTD SPON ADR		IBN						
100.0000	08/02/2013	01/19/2012		3,207.59	3,288.83	0.00	-81.24	0.00	0.00

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CAPITAL GUARDIAN TRUST COMPANY
C/O PCS TAX, 6455 IRVINE CENTER DR, C-2B
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THE STEPHENSON FOUNDATION
THOMAS F & BARBARA U STEPHENSON
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198 FAIR OAKS LANE
ATHERTON, CA 94027

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Cusip	Description	Date of Sale or Exchange	Date of Acquisition	Stock or Other Symbol	Cost or Other Basis	Wash Sale Loss Disallowed	Net Gain or Loss	Federal Income Tax Withheld	State Tax Withheld
45104G104	ICICI BANK LTD SPON ADR			IBN					
300.0000	08/02/2013 Various			9,594.19	9,558.60	0.00	35.59	0.00	0.00
45104G104	ICICI BANK LTD SPON ADR			IBN					
100.0000	08/05/2013 01/18/2012			3,204.83	3,117.22	0.00	87.61	0.00	0.00
459200101	INTERNATIONAL BUSINESS MACHINES CORP			IBM					
75.0000	05/01/2013 01/07/2011			15,111.13	11,092.04	0.00	4,019.09	0.00	0.00
459200101	INTERNATIONAL BUSINESS MACHINES CORP			IBM					
300.0000	07/11/2013 01/07/2011			57,981.28	44,368.14	0.00	13,613.14	0.00	0.00
459200101	INTERNATIONAL BUSINESS MACHINES CORP			IBM					
125.0000	07/12/2013 01/07/2011			24,060.09	18,486.72	0.00	5,573.37	0.00	0.00
426281101	JACK HENRY & ASSOC INC			JKHY					
100.0000	02/11/2013 04/07/2011			4,350.39	3,380.03	0.00	970.36	0.00	0.00
426281101	JACK HENRY & ASSOC INC			JKHY					
100.0000	02/11/2013 04/26/2011			4,349.90	3,375.99	0.00	973.91	0.00	0.00
647346006	JGC CORP			1963.JP					
1000.0000	02/15/2013 01/11/2011			25,080.14	22,591.73	0.00	2,488.41	0.00	0.00
46625H100	JPMORGAN CHASE & CO			JPM					
200.0000	07/01/2013 Various			10,506.82	8,892.87	0.00	1,613.95	0.00	0.00

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C/O PCS TAX, 6455 IRVINE CENTER DR, C-2B
IRVINE, CA 92618

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Cusip	Description	Stock or Other Symbol	Stocks Bonds, etc.	Cost or Other Basis	Wash Sale Loss Disallowed	Net Gain or Loss	Federal Income Tax Withheld	State Tax Withheld
482480100	KLA-TENCOR CORP	KLAC	33,098.25	22,603.80	0.00	10,494.45	0.00	0.00
600.0000	03/08/2013 01/07/2011							
482480100	KLA-TENCOR CORP	KLAC	6,427.97	3,546.77	0.00	2,881.20	0.00	0.00
100.0000	10/21/2013 08/24/2011							
482480100	KLA-TENCOR CORP	KLAC	6,479.24	3,531.96	0.00	2,947.28	0.00	0.00
100.0000	10/22/2013 08/23/2011							
574081907	LINDE AG	LIN.GR	7,329.02	5,816.89	0.00	1,512.13	0.00	0.00
39.0000	07/10/2013 02/04/2011							
574081907	LINDE AG	LIN.GR	3,639.40	2,833.87	0.00	805.53	0.00	0.00
19.0000	07/15/2013 02/04/2011							
574081907	LINDE AG	LIN.GR	8,560.35	6,713.49	0.00	1,846.86	0.00	0.00
45.0000	07/18/2013 Various							
574081907	LINDE AG	LIN.GR	3,658.51	2,837.92	0.00	820.59	0.00	0.00
19.0000	07/19/2013 02/07/2011							
574081907	LINDE AG	LIN.GR	3,229.92	2,539.20	0.00	690.72	0.00	0.00
17.0000	07/23/2013 Various							
574081907	LINDE AG	LIN.GR	3,657.73	2,837.91	0.00	819.82	0.00	0.00
19.0000	07/31/2013 Various							

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574081907	LINDE AG	08/01/2013 Various	LIN GR	3,466.24	2,688.56	0.00	777.68	0.00	0.00
574081907	LINDE AG	08/06/2013 Various	LIN GR	8,647.87	6,803.06	0.00	1,844.81	0.00	0.00
574081907	LINDE AG	08/08/2013 03/22/2011	LIN GR	5,141.74	4,087.97	0.00	1,053.77	0.00	0.00
406141903	LVMH MOET HENNESSY LOUIS VUITTON SA	02/08/2013 Various	MC.FP	12,067.23	10,529.01	0.00	1,538.22	0.00	0.00
406141903	LVMH MOET HENNESSY LOUIS VUITTON SA	03/14/2013 Various	MC.FP	17,731.52	14,918.48	0.00	2,813.04	0.00	0.00
571748102	MARSH & MCLENNAN COS INC	02/11/2013 09/07/2011	MMC	3,639.37	2,963.69	0.00	675.68	0.00	0.00
571748102	MARSH & MCLENNAN COS INC	02/11/2013 09/07/2011	MMC	3,629.20	2,963.69	0.00	665.51	0.00	0.00
659678007	6596785	04/09/2013 02/03/2012	MON	7,027.12	9,288.08	0.00	-2,260.96	0.00	0.00
61166W101	MONSANTO CO NEW COM	07/01/2013 02/08/2011	MON	9,742.36	7,452.36	0.00	2,290.00	0.00	0.00

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198 FAIR OAKS LANE
ATHERTON, CA 94027

Capital Guardian Trust Company

C/O PCS TAX, 6455 IRVINE CENTER DR, C-2B
IRVINE, CA 92618

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61166W101	MONSANTO CO NEW COM	07/01/2013	01/07/2011	MON	9,756.74	7,139.51	0.00	2,617.23	0.00	0.00
100.0000										
661040006	MURATA MANUFACTURING CO LTD	03/08/2013	01/11/2011	6610403	19,936.31	22,196.02	0.00	-2,259.71	0.00	0.00
300.0000										
661040006	MURATA MANUFACTURING CO LTD	05/08/2013	01/11/2011	6610403	16,030.50	14,797.35	0.00	1,233.15	0.00	0.00
200.0000										
636518102	NATIONAL INSTRUMENTS CORP	05/13/2013	03/15/2012	NATI	5,694.21	5,529.20	0.00	165.01	0.00	0.00
200.0000										
636518102	NATIONAL INSTRUMENTS CORP	05/14/2013	03/15/2012	NATI	2,849.20	2,764.60	0.00	84.60	0.00	0.00
100.0000										
636518102	NATIONAL INSTRUMENTS CORP	05/15/2013	03/15/2012	NATI	2,851.90	2,764.60	0.00	87.30	0.00	0.00
100.0000										
636518102	NATIONAL INSTRUMENTS CORP	05/16/2013	03/15/2012	NATI	2,851.43	2,764.60	0.00	96.83	0.00	0.00
100.0000										
663710002	NEWCREST MINING NPV	04/02/2013	01/10/2011	NCM	4,161.36	7,651.63	0.00	-3,490.27	0.00	0.00
198.0000										
663710002	NEWCREST MINING NPV	04/04/2013	01/10/2011	NCM	8,324.51	16,617.18	0.00	-8,292.67	0.00	0.00
430.0000										

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 IRVINE, CA 92618

Sales are listed at Gross Proceeds less commissions and option premiums.

Cusip	Description	Date of Sale or Exchange	Quantity Sold	Stock or Other Symbol	Stocks Bonds, etc.	Cost or Other Basis	Wash Sale Loss Disallowed	Net Gain or Loss	Federal Income Tax Withheld	State Tax Withheld
N63218106	NIELSEN HOLDINGS NV US\$			NLSN						
200.0000	02/11/2013 Various			6,484.22		6,002.05	0.00	482.16	0.00	0.00
N63218106	NIELSEN HOLDINGS NV US\$			NLSN						
200.0000	02/11/2013 Various			6,483.26		5,681.99	0.00	801.26	0.00	0.00
655044105	NOBLE ENERGY INC			NBL						
100.0000	07/31/2013 02/03/2012			6,253.15		5,121.00	0.00	1,132.15	0.00	0.00
655044105	NOBLE ENERGY INC			NBL						
100.0000	08/01/2013 Various			6,367.28		4,636.63	0.00	1,730.65	0.00	0.00
710306903	NOVARTIS AG NAMED			7103065						
134.0000	07/01/2013 01/10/2011			9,480.80		7,527.34	0.00	1,953.46	0.00	0.00
670851104	OI SA ON ADR			OIBR C						
100.0000	01/23/2013 Various			444.90		1,181.39	0.00	-736.49	0.00	0.00
670851104	OI SA ON ADR			OIBR C						
200.0000	07/01/2013 Various			351.11		2,260.70	0.00	-1,909.59	0.00	0.00
670851104	OI SA ON ADR			OIBR C						
188.0000	07/02/2013 Various			309.87		2,078.13	0.00	-1,768.26	0.00	0.00
670851203	OI SA PN ADR			OIBR						
700.0000	01/24/2013 Various			2,782.43		6,089.37	0.00	-3,306.94	0.00	0.00

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2013 Tax Information Statement

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Account Number:

44-150800

Recipient's Tax ID Number:

XX-XXX0092

☐ Corrected

☐ 2nd TIN notice

Recipient's Name and Address:
THE STEPHENSON FOUNDATION
THOMAS F & BARBARA U STEPHENSON
DIRECTORS OF THE FDN
198 FAIR OAKS LANE
ATHERTON, CA 94027

CAPITAL GUARDIAN TRUST COMPANY
C/O PCS TAX, 6455 IRVINE CENTER DR, C-2B
IRVINE, CA 92618

Sales are listed at Gross Proceeds less commissions and option premiums.

Cusip	Description	Date of Sale or Exchange	Stock or Other Symbol	Stocks Bonds, etc.	Cost or Other Basis	Wash Sale Loss Disallowed	Net Gain or Loss	Federal Income Tax Withheld	State Tax Withheld
670851203	OI SA PN ADR		OIBR						
300.0000	01/24/2013 Various		1,187.07		2,604.74	0.00	-1,417.67	0.00	0.00
670851203	OI SA PN ADR		OIBR						
300.0000	07/01/2013 Various		487.49		2,544.94	0.00	-2,057.45	0.00	0.00
670851203	OI SA PN ADR		OIBR						
1100.0000	07/02/2013 Various		1,728.18		9,142.01	0.00	-7,413.83	0.00	0.00
670851203	OI SA PN ADR		OIBR						
600.0000	07/03/2013 Various		926.26		4,958.01	0.00	-4,031.75	0.00	0.00
670851203	OI SA PN ADR		OIBR						
700.0000	07/04/2013 Various		1,071.33		5,783.71	0.00	-4,712.38	0.00	0.00
670851203	OI SA PN ADR		OIBR						
1200.0000	07/05/2013 Various		1,844.11		9,722.26	0.00	-7,878.15	0.00	0.00
670851203	OI SA PN ADR		OIBR						
107.0000	07/08/2013 05/20/2011		167.02		826.25	0.00	-659.23	0.00	0.00
68389X105	ORACLE CORP		ORCL						
300.0000	03/07/2013 Various		10,766.75		9,818.17	0.00	948.58	0.00	0.00
68389X105	ORACLE CORP		ORCL						
200.0000	08/15/2013 01/07/2011		6,541.74		6,223.94	0.00	317.80	0.00	0.00

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68389X105	ORACLE CORP		ORCL					
300.0000	08/15/2013	01/07/2011	9,813.03	9,335.91	0.00	477.12	0.00	0.00
70706P955	PENGROWTH ENERGY CORP C\$		PGF.CN					
1600.0000	01/29/2013	Various	7,037.32	16,848.02	0.00	-9,810.70	0.00	0.00
033184003	PREMIER FARNELL PLC		PFL.N					
600.0000	03/07/2013	03/08/2011	2,018.75	2,973.57	0.00	-954.82	0.00	0.00
033184003	PREMIER FARNELL PLC		PFL.N					
3100.0000	03/07/2013	Various	10,463.84	15,270.21	0.00	-4,806.37	0.00	0.00
033184003	PREMIER FARNELL PLC		PFL.N					
800.0000	03/15/2013	03/10/2011	2,661.34	3,884.31	0.00	-1,222.97	0.00	0.00
033184003	PREMIER FARNELL PLC		PFL.N					
1000.0000	03/25/2013	03/10/2011	3,384.12	4,855.38	0.00	-1,471.26	0.00	0.00
033184003	PREMIER FARNELL PLC		PFL.N					
800.0000	04/02/2013	02/22/2011	2,667.43	3,899.71	0.00	-1,232.28	0.00	0.00
033184003	PREMIER FARNELL PLC		PFL.N					
1100.0000	04/03/2013	02/22/2011	3,652.10	5,362.11	0.00	-1,710.01	0.00	0.00
033184003	PREMIER FARNELL PLC		PFL.N					
800.0000	04/11/2013	Various	2,604.10	3,849.87	0.00	-1,245.79	0.00	0.00

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 ATHERTON, CA 94027

Account Number: 44-150800
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CAPITAL GUARDIAN TRUST COMPANY
 C/O PCS TAX, 6455 IRVINE CENTER DR, C-2B
 IRVINE, CA 92618

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Cusip	Description	Stock or Other Symbol	Stocks Bonds, etc.	Cost or Other Basis	Wash Sale Loss Disallowed	Net Gain or Loss	Federal Income Tax Withheld	State Tax Withheld
033184003	PREMIER FARNELL PLC	PFL.LN						
200.0000	04/17/2013 02/07/2011	626.24		950.00	0.00	-323.76	0.00	0.00
743315103	PROGRESSIVE CORP OHIO	PGR						
500.0000	03/07/2013 01/07/2011	12,381.27		9,897.75	0.00	2,483.52	0.00	0.00
747525103	QUALCOMM INC	QCOM						
200.0000	02/08/2013 01/07/2011	13,407.73		10,366.00	0.00	3,041.73	0.00	0.00
B24CGK904	RECKITT BENCKISER GROUP PLC	RB.LN						
300.0000	10/17/2013 Various	21,028.78		16,288.39	0.00	4,740.39	0.00	0.00
760759100	REPUBLIC SERVICES INC	RSG						
600.0000	10/16/2013 Various	19,834.39		17,790.47	0.00	2,043.92	0.00	0.00
760759100	REPUBLIC SERVICES INC	RSG						
100.0000	10/17/2013 03/14/2011	3,309.73		2,952.92	0.00	356.81	0.00	0.00
B3DCZF902	RICHEMONT CIE FIN	B3DCZF3						
102.0000	03/25/2013 03/08/2011	7,894.41		6,043.74	0.00	1,850.67	0.00	0.00
071887004	RIO TINTO PLC REG	0718875						
200.0000	03/21/2013 01/10/2011	9,522.41		13,671.02	0.00	-4,148.61	0.00	0.00
071887004	RIO TINTO PLC REG	0718875						
100.0000	03/21/2013 01/10/2011	4,784.79		6,835.51	0.00	-2,050.72	0.00	0.00

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44-150800

XX-XXX0092

Account Number:

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CAPITAL GUARDIAN TRUST COMPANY
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IRVINE, CA 92618

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071887004	RIO TINTO PLC REG	03/22/2013	01/10/2011	4,721.07	6,835.51	0.00	-2,114.44	0.00	0.00
100.0000									
071887004	RIO TINTO PLC REG	07/04/2013	Various	16,090.67	26,925.26	0.00	-10,834.59	0.00	0.00
400.0000									
780259206	ROYAL DUTCH SHELL CL A ADR	05/20/2013	Various	20,380.88	19,729.59	0.00	651.29	0.00	0.00
300.0000									
780259206	ROYAL DUTCH SHELL CL A ADR	05/21/2013	01/07/2011	6,812.39	6,576.53	0.00	235.86	0.00	0.00
100.0000									
780259206	ROYAL DUTCH SHELL CL A ADR	09/16/2013	01/07/2011	6,523.09	6,576.53	0.00	-53.44	0.00	0.00
100.0000									
780259206	ROYAL DUTCH SHELL CL A ADR	09/17/2013	01/07/2011	6,496.68	6,576.53	0.00	-79.85	0.00	0.00
100.0000									
780259206	ROYAL DUTCH SHELL CL A ADR	09/17/2013	Various	13,057.48	13,153.06	0.00	-95.56	0.00	0.00
200.0000									
780259206	ROYAL DUTCH SHELL CL A ADR	09/18/2013	01/07/2011	5,680.77	5,721.58	0.00	-40.81	0.00	0.00
87.0000									
477309009	SAMSUNG ELEC GDS N/V PF								
31.0000									
0593Q1									
				11,092.58	9,083.00	0.00	2,009.58	0.00	0.00

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198 FAIR OAKS LANE
ATHERTON, CA 94027

Account Number: 44-150800

Recipient's Tax ID Number: XX-XXX0092

Capital Guardian Trust Company

C/O PCS TAX, 6455 IRVINE CENTER DR, C-2B
IRVINE, CA 92618

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Cusip	Description	Date of Sale or Exchange	Date of Acquisition	Quantity Sold	Stock or Other Symbol	Stocks Bonds, etc.	Cost or Other Basis	Wash Sale Loss Disallowed	Net Gain or Loss	Federal Income Tax Withheld	State Tax Withheld
477309009	SAMSUNG ELEC GDS N/V PF	07/22/2013	01/10/2011	30.0000	0593Q1	10,725.33	8,790.00	0.00	1,935.33	0.00	0.00
484628904	SAP AG	10/17/2013	01/10/2011	268.0000	4846288	19,674.62	13,138.70	0.00	6,535.92	0.00	0.00
483410007	SCHNEIDER ELECTRIC SA	07/17/2013	02/07/2011	8.0000	4834108	579.15	608.90	0.00	-29.75	0.00	0.00
B09RMQ900	SEADRILL LTD	02/14/2013	10/27/2011	207.0000	SDRLNO	7,764.60	7,217.20	0.00	547.40	0.00	0.00
812578102	SEATTLE GENETICS INC	05/02/2013	07/11/2011	100.0000	SGEN	3,637.35	2,065.85	0.00	1,571.50	0.00	0.00
812578102	SEATTLE GENETICS INC	05/03/2013	07/11/2011	100.0000	SGEN	3,658.11	2,065.85	0.00	1,592.26	0.00	0.00
812578102	SEATTLE GENETICS INC	05/06/2013	07/11/2011	100.0000	SGEN	3,642.55	2,065.85	0.00	1,576.70	0.00	0.00
677062903	SOFTBANK CORP	02/12/2013	01/11/2011	200.0000	6770620	7,656.07	6,885.14	0.00	770.93	0.00	0.00
677062903	SOFTBANK CORP	04/05/2013	01/11/2011	400.0000	6770620	18,814.28	13,770.27	0.00	5,044.01	0.00	0.00

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Account Number:

44-150800

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CAPITAL GUARDIAN TRUST COMPANY
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IRVINE, CA 92618

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198 FAIR OAKS LANE
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Cusip	Description	Date of Sale or Exchange	Date of Acquisition	Stock or Other Symbol	Cost or Other Basis	Wash Sale Loss Disallowed	Net Gain or Loss	Federal Income Tax Withheld	State Tax Withheld
715603908	SONOVA HOLDING AG			SOON.VX					
24.0000	01/15/2013	Various		2,743.90	3,487.70	0.00	-743.80	0.00	0.00
715603908	SONOVA HOLDING AG			SOON.VX					
23.0000	01/15/2013	Various		2,627.83	3,133.21	0.00	-505.38	0.00	0.00
715603908	SONOVA HOLDING AG			SOON.VX					
4.0000	01/16/2013	01/10/2011		454.41	481.74	0.00	-27.33	0.00	0.00
715603908	SONOVA HOLDING AG			SOON.VX					
8.0000	01/16/2013	01/10/2011		908.50	963.47	0.00	-54.97	0.00	0.00
715603908	SONOVA HOLDING AG			SOON.VX					
1.0000	01/17/2013	01/10/2011		112.89	120.43	0.00	-7.54	0.00	0.00
715603908	SONOVA HOLDING AG			SOON.VX					
32.0000	05/21/2013	01/10/2011		3,353.56	3,853.88	0.00	-500.32	0.00	0.00
715603908	SONOVA HOLDING AG			SOON.VX					
11.0000	05/28/2013	01/10/2011		1,207.33	1,324.77	0.00	-117.44	0.00	0.00
715603908	SONOVA HOLDING AG			SOON.VX					
29.0000	05/29/2013	01/10/2011		3,202.41	3,492.58	0.00	-290.17	0.00	0.00
715603908	SONOVA HOLDING AG			SOON.VX					
28.0000	05/30/2013	01/10/2011		3,062.51	3,372.15	0.00	-309.64	0.00	0.00

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Cusip	Description	Stock or Other Symbol	Cost or Other Basis	Wash Sale Loss Disallowed	Net Gain or Loss	Federal Income Tax Withheld	State Tax Withheld
715603908	SONOVA HOLDING AG	SOON.VX					
2.0000	05/31/2013 10/2011	221.85	240.87	0.00	-19.02	0.00	0.00
715603908	SONOVA HOLDING AG	SOON.VX					
1.0000	05/31/2013 01/10/2011	111.49	120.44	0.00	-8.95	0.00	0.00
715603908	SONOVA HOLDING AG	SOON.VX					
5.0000	05/31/2013 Various	555.45	514.40	0.00	41.05	0.00	0.00
715603908	SONOVA HOLDING AG	SOON.VX					
3.0000	06/13/2013 04/07/2011	338.69	295.47	0.00	43.22	0.00	0.00
715603908	SONOVA HOLDING AG	SOON.VX					
9.0000	06/17/2013 04/07/2011	1,052.29	886.42	0.00	165.87	0.00	0.00
715603908	SONOVA HOLDING AG	SOON.VX					
39.0000	06/21/2013 04/07/2011	4,375.88	3,841.17	0.00	534.71	0.00	0.00
715603908	SONOVA HOLDING AG	SOON.VX					
5.0000	06/27/2013 04/07/2011	528.80	492.46	0.00	36.34	0.00	0.00
715603908	SONOVA HOLDING AG	SOON.VX					
2.0000	07/02/2013 04/07/2011	214.28	196.98	0.00	17.30	0.00	0.00
715603908	SONOVA HOLDING AG	SOON.VX					
1.0000	07/02/2013 04/07/2011	107.92	98.49	0.00	9.43	0.00	0.00

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715603908	SONOVA HOLDING AG	07/03/2013	04/07/2011	315.17	295.48	0.00	19.69	0.00	0.00
715603908	SONOVA HOLDING AG	07/04/2013	04/07/2011	211.15	196.98	0.00	14.17	0.00	0.00
854502101	STANLEY BLACK & DECKER INC	02/08/2013	Various	7,618.78	6,864.99	0.00	753.80	0.00	0.00
854502101	STANLEY BLACK & DECKER INC	04/08/2013	Various	19,360.49	14,823.54	0.00	4,536.95	0.00	0.00
553397902	SWISSCOM AG REG	07/18/2013	01/10/2011	4,865.23	4,705.27	0.00	159.96	0.00	0.00
553397902	SWISSCOM AG REG	07/19/2013	01/10/2011	9,742.90	9,410.54	0.00	332.36	0.00	0.00
688380906	SYSMEX CORP	04/26/2013	01/11/2011	6,521.77	3,398.30	0.00	3,123.47	0.00	0.00
688380906	SYSMEX CORP	04/30/2013	01/11/2011	6,482.99	3,398.30	0.00	3,084.69	0.00	0.00
688380906	SYSMEX CORP	05/01/2013	02/08/2011	6,322.42	3,358.56	0.00	2,963.86	0.00	0.00

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688380906	SYSMEX CORP	05/02/2013	Various	6889.JP	12,395.78	6,650.57	0.00	5,745.20	0.00	0.00
87971M962	TELUS CORP	03/08/2013	01/07/2011	T.CN	6,858.01	4,396.23	0.00	2,461.78	0.00	0.00
87971M962	TELUS CORP	03/12/2013	01/07/2011	T.CN	6,819.68	4,396.23	0.00	2,423.45	0.00	0.00
254687106	THE WALT DISNEY CO	03/08/2013	01/07/2011	DIS	28,581.90	19,739.95	0.00	8,841.95	0.00	0.00
254687106	THE WALT DISNEY CO	10/21/2013	01/07/2011	DIS	13,468.46	7,895.98	0.00	5,572.48	0.00	0.00
886547108	TIFFANY & CO NEW	08/23/2013	01/27/2012	TIF	8,155.05	6,343.56	0.00	1,811.49	0.00	0.00
886547108	TIFFANY & CO NEW	08/23/2013	01/30/2012	TIF	8,158.11	6,291.45	0.00	1,866.66	0.00	0.00
88732J207	TIME WARNER CABLE INC	05/06/2013	Various	TWC	28,874.80	20,512.28	0.00	8,362.52	0.00	0.00
907818108	UNION PACIFIC CORP	02/08/2013	01/07/2011	UNP	26,561.44	18,942.00	0.00	7,619.44	0.00	0.00

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91324P102	UNITEDHEALTH GROUP INC			UNH					
100.0000	02/11/2013	01/07/2011		5,722.58	3,840.00	0.00	1,882.58	0.00	0.00
91324P102	UNITEDHEALTH GROUP INC			UNH					
100.0000	02/11/2013	01/07/2011		5,743.87	3,840.00	0.00	1,903.87	0.00	0.00
Total Long Term Sales					2,265,222.61	0.00	138,518.33	0.00	0.00

Application for Extension of Time To File an Exempt Organization Return

OMB No. 1545-1709

► 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.	Employer identification number (EIN) or
	STEPHENSON FOUNDATION	94-3320092
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. 3000 SAND HILL ROAD, BLDG. 4, NO. 250	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. MENLO PARK, CA 94025	

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

BARBARA STEPHENSON

- The books are in the care of ► **3000 SAND HILL RD BLDG #4-250 - MENLO PARK, CA 94025**
Telephone No. ► **(650) 854-3927** Fax No. ►

- 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 _____

Frank, Rimmerman & Co. LLP 94-1341042

- 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 **Palo Alto, CA 94304**

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	\$	26,737.
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	\$	10,737.
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	\$	16,000.

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.

- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** and check this box ☒ **X**

Note. Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868.

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** (on page 1).

Part II Additional (Not Automatic) 3-Month Extension of Time. Only file the original (no copies needed).

Enter filer's identifying number, see instructions

Type or print File by the due date for filing your return. See instructions.	Name of exempt organization or other filer, see instructions.	Employer identification number (EIN) or
	STEPHENSON FOUNDATION	94-3320092
	Number, street, and room or suite no. If a P.O. box, see instructions.	Social security number (SSN)
	3000 SAND HILL ROAD, BLDG. 4, NO. 250	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions.	
	MENLO PARK, CA 94025	

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-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

STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.

BARBARA STEPHENSON

- The books are in the care of **3000 SAND HILL RD BLDG #4-250 - MENLO PARK, CA 94025**
Telephone No. **(650) 854-3927** Fax No.

- 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.

4 I request an additional 3-month extension of time until **NOVEMBER 15, 2014**.

5 For calendar year **2013**, or other tax year beginning , and ending .

6 If the tax year entered in line 5 is for less than 12 months, check reason: ☐ Initial return ☐ Final return
☐ Change in accounting period

7 State in detail why you need the extension

THE TAXPAYER RESPECTFULLY REQUESTS ADDITIONAL TIME TO GATHER THE INFORMATION NECESSARY TO FILE A COMPLETE AND ACCURATE RETURN

8a 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.	8a	\$	26,737.
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 and any amount paid previously with Form 8868.	8b	\$	26,737.
c Balance due. Subtract line 8b from line 8a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	8c	\$	0.

Signature and Verification must be completed for Part II only.

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature **Frank Rimmerman** Title **CPA**

Date **7/23/14**

Form 8868 (Rev. 1-2014)

Frank, Rimmerman & Co. LLP 94-1341042
1801 Page Mill Road
Palo Alto, CA 94304