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Form 990-PF



Department of the Treasury
Internal Revenue Service

Return of Private Foundation

or Section 4947(a)(1) Trust Treated as Private Foundation

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Information about Form 990-PF and its instructions is at www.irs.gov/form990pf.




OMB No 1545-0052

2013

Open to Public Inspection



For calendar year 2013, or tax year beginning 01-01-2013 , and ending 12-31-2013

Name of foundation Summa Peto Foundation		A Employer identification number 94-3343213	
Number and street (or P O box number if mail is not delivered to street address) 177 Ramoso Road		Room/suite	
City or town, state or province, country, and ZIP or foreign postal code Portola Valley, CA 94028		B Telephone number (see instructions) (650) 851-7707	
G Check all that apply <div><input type="checkbox"/> Initial return</div> <div><input type="checkbox"/> Initial return of a former public charity</div> <div><input type="checkbox"/> Final return</div> <div><input type="checkbox"/> Amended return</div> <div><input type="checkbox"/> Address change</div> <div><input type="checkbox"/> Name change</div>		C If exemption application is pending, check here <input type="checkbox"/>	
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) <input type="checkbox"/> \$ 559,617		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)				
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	1,160	1,160	1,160	
	4 Dividends and interest from securities.	14,391	14,391	14,391	
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	22,195			
	b Gross sales price for all assets on line 6a 246,100				
	7 Capital gain net income (from Part IV, line 2) . . .		21,480		
	8 Net short-term capital gain			5,008	
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	37,746	37,031	20,559	
	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)	 3,314	3,314		
	b Accounting fees (attach schedule)	 2,708	2,708		
	c Other professional fees (attach schedule)	 4,915	4,915		
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	 139	139		
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	 30	30		
	24 Total operating and administrative expenses. Add lines 13 through 23	11,106	11,106		0
	25 Contributions, gifts, grants paid	46,500			46,500
	26 Total expenses and disbursements. Add lines 24 and 25	57,606	11,106		46,500
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-19,860			
	b Net investment income (if negative, enter -0-)		25,925		
	c Adjusted net income (if negative, enter -0-)			20,559	

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	5,134	9,456	9,456
	2	Savings and temporary cash investments	32,053	6,432	6,432
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	489,410	495,017	543,729
	c	Investments—corporate bonds (attach schedule).			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15	Other assets (describe ▶ _____)				
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	526,597	510,905	559,617	
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)		0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted	526,597	510,905	
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	Total net assets or fund balances (see page 17 of the instructions)	526,597	510,905	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	526,597	510,905	

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	526,597
2	Enter amount from Part I, line 27a	2	-19,860
3	Other increases not included in line 2 (itemize) ▶ 	3	48,712
4	Add lines 1, 2, and 3	4	555,449
5	Decreases not included in line 2 (itemize) ▶ 	5	44,544
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	510,905

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)
1 a	Short Term Covered -See PDF	P	2013-01-01	2013-12-01
b	Long Term Covered - See PDF	P	2012-01-01	2013-12-01
c	Long Term Noncovered-See PDF	P	2012-01-01	2013-12-01
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 12,950		7,942	5,008
b 200,550		183,458	17,092
c 32,600		33,220	-620
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a			5,008
b			17,092
c			-620
d			
e			

2	Capital gain net income or (net capital loss)	<div><div>If gain, also enter in Part I, line 7</div><div>If (loss), enter -0- in Part I, line 7</div></div>	2	21,480
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)		3	5,008
If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8				

Part V

Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)

If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No
If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see page 18 of the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2012	46,373		
2011	43,042		
2010	43,375		
2009	45,144		
2008	42,893		

2	Total of line 1, column (d).	2	
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	
4	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.	4	
5	Multiply line 4 by line 3.	5	
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	259
7	Add lines 5 and 6.	7	259
8	Enter qualifying distributions from Part XII, line 4.	8	46,500

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

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)					
1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1		1	259		
Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)					
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		2	259		
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)					
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)				2	
3 Add lines 1 and 2.				3	259
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4			
5 Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		5	259		
6 Credits/Payments		7			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a				
b Exempt foreign organizations—tax withheld at source	6b				
c Tax paid with application for extension of time to file (Form 8868)	6c				
d Backup withholding erroneously withheld	6d				
7 Total credits and payments Add lines 6a through 6d.		7			
8 Enter any penalty for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached		8			
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	259		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		10			
11 Enter the amount of line 10 to be Credited to 2014 estimated tax Refunded		11			

Part VII-A Statements Regarding Activities				
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		Yes	No
		1a		No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.</i>	1b		No
c	Did the foundation file Form 1120-POL for this year?.	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation \$ (2) On foundation managers \$			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?.	4a		No
b	If "Yes," has it filed a tax return on Form 990-T for this year?.	4b		No
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6		No
7	Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV.</i>	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) 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? <i>If "No," attach explanation .</i>	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>	9		No
10	Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>	10		No

Part VII-A

Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address N/A				
14	The books are in care of John L Doyle Telephone no (650) 851-7707 Located at 177 Ramoso Rd Portola Valley CA ZIP +4 94028			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here and enter the amount of tax-exempt interest received or accrued during the year.	15		
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	Yes	No
See instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes", enter the name of the foreign country				

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days).			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here.	1b		No
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? If "Yes," list the years 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions).	2b		No
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?			
b	If "Yes," did it have excess business holdings in 2013 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013.).	3b		No
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?	4b		No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a	During the year did the foundation pay or incur any amount to			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
	(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
	(4) Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions).	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
b	If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?	5b		No
	Organizations relying on a current notice regarding disaster assistance check here.			
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?			
	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?			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	6b		No
	If "Yes" to 6b, file Form 8870.			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?			
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	7b		No

Part VIII

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

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).				
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
John L Doyle	Chairman	0		
177 Ramoso Rd	0 00			
Portola Valley, CA 94028				
Judith A Doyle	Director	0		
177 Ramoso Rd	0 00			
Portola Valley, CA 94028				
Peter J Doyle	Director	0		
1110 Golden Way	0 00			
Los Altos, CA 94024				
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
Total number of other employees paid over \$50,000.				

Part VIII

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

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services.		

Part IX-A

Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1	
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See page 24 of the instructions	
3	
Total. Add lines 1 through 3	

Part X

Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	0
b	Average of monthly cash balances.	1b	0
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	0
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	
3	Subtract line 2 from line 1d.	3	0
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	0
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	0
6	Minimum investment return. Enter 5% of line 5.	6	0

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	
2a	Tax on investment income for 2013 from Part VI, line 5.	2a	259
b	Income tax for 2013 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	259
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	259
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	259
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	0

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	46,500
b	Program-related investments—total from Part IX-B.	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	46,500
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions).	5	259
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	46,241
Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years			

Part XIII

Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2012	(c) 2012	(d) 2013
1 Distributable amount for 2013 from Part XI, line 7				0
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only.				
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2013				
a From 2008.	43,200			
b From 2009.	45,200			
c From 2010.	43,500			
d From 2011.	43,500			
e From 2012.	46,500			
f Total of lines 3a through e.	221,900			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 46,500				
a Applied to 2012, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2013 distributable amount.				
e Remaining amount distributed out of corpus	46,500			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	268,400			
b Prior years' undistributed income Subtract line 4b from line 2b.				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d Subtract line 6c from line 6b Taxable amount—see instructions				
e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount—see instructions				
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions).				
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions). . .	43,200			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	225,200			
10 Analysis of line 9				
a Excess from 2009. . . .	45,200			
b Excess from 2010. . . .	43,500			
c Excess from 2011. . . .	43,500			
d Excess from 2012. . . .	46,500			
e Excess from 2013. . . .	46,500			

Part XIV

4942(j)(3) or 4942(j)(5)

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

a "Assets" alternative test—enter

(1) Value of all assets

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

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

c "Support" alternative test—enter

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

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

(3) Largest amount of support from an exempt organization

(4) Gross investment income

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

1 Information Regarding Foundation Managers:

■ 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 Additional Data Table

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

2 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 of the person to whom applications should be addressed

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

c Any submission deadlines

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

Part XV

Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	46,500
b Approved for future payment				
Total			3b	

Enter gross amounts unless otherwise indicated


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

Form **990-PF** (2013)


Form 990PF Part XV Line 1a - List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000).

John L Doyle
Judith A Doyle

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Hiller Aviation Institute 601 Sky Way San Carlos, CA 94070	None	Public	Aviation museum & educational support	1,000
Lucille Packard Childrens Fund 725 Welch Rd Palo Alto, CA 94304	None	Public	Health research and treatment of children	3,000
Doctors Without Borders 333 7th Ave 2nd Floor New York, NY 10001	None	Public	Health care for international at-risk populations	3,000
The Salvation Army PO Box 193465 San Francisco, CA 94119	None	Public	Emergency Support Services	7,500
Women's Recovery Association 1450 Chapin Ave Burlingame, CA 94010	None	Public	Drug recovery treatment for at-risk women & children	2,000
CuriOdyssey 1651 Coyote Dr San Mateo, CA 94401	None	Public	Enviornmental education & museum support	1,000
Peninsula Family Service Agency 24 Second Ave San Mateo, CA 94401	None	Public	Counseling and support for troubled families	2,500
Children's Health Council 650 Clark Way Palo Alto, CA 94304	None	Public	Education for difficult childrn/families	5,000
Special Olympics of N CA 3480 Buskirk Ave 340 Pleasant Hill, CA 94523	None	Public	Athletic events for handicapped children	1,000
St Francis Center Redwood City 151 Buckingham Ave Redwood City, CA 94063	None	Public	Education/clothing for deprived children	5,000
Peninsula Open Space Trust 222 High St Palo Alto, CA 94301	None	Public	Land purchases for conservation of open space	500
Rebuilding Together PO Box 4031 Menlo Park, CA 94026	None	Public	Low Cost housing projects for low income families	1,000
Child Advocates 509 Valley Way Milpitas, CA 95035	None	Public	Support for abused and neglected children/wards of the court	2,000
Christ's Hospital Horsham West Sussex, RH13 OYP, England, West Sussex RH13 OYP OC	None	Public	Education for disadvantaged children	4,000
Second Harvest Food Bank PO Box 213 San Mateo, CA 94401	None	Public	Food for Underpriveleged Persons	1,000
Total  3a				46,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
Pathways Hospice Foundation 585 N Mary Ave Sunnyvale, CA 94085	None	Public	Hospice Services	500
Ravenswood Fam Health Center 1798A Bay Rd East Palo Alto, CA 94303	None	Public	Health Services for Uninsured Minority Area	1,000
Cystic Fibrosis Research Inc 1672 Bayshore Parkway Mountain View, CA 94043	None	Public	Cystic Fibrosis Research	1,000
Pets in Need 873 5th Ave Redwood City, CA 94063	None	Public	Animal Welfare	1,000
Monterey Bay Aquarium 886 Cannery Row Monterey CA 93940 Monterey, CA 93940	None	Public	Oceanographic Research	2,500
Smile Train PO Box 96231 Washington, DC 20090	None	Public	Specialized Surgery for Children	1,000
Total  3a				46,500

TY 2013 Accounting Fees Schedule**Name:** Summa Peto Foundation**EIN:** 94-3343213**Software ID:** 13000170**Software Version:** 2013v3.1

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Tax Preparation Fees	2,708	2,708	0	0

TY 2013 General Explanation Attachment**Name:** Summa Peto Foundation**EIN:** 94-3343213**Software ID:** 13000170**Software Version:** 2013v3.1

Identifier	Return Reference	Explanation
	General Explanation Supplemental Information for Form 990-PF	Statement 10Balance SheetYear End Book ValueIn prior years, the organization had made a decision for simplicity purposes to reflect year end values for both book value and market value at market value. This year it was determined that information reporting from the brokerage was sufficient to allow reflection of "cost basis" of the equities and mutual funds for year end "book value". This change has been reflected on the balance sheet in Part II Column B labeled "book value". Also an adjustment was made in Part III Line 5 to reflect the one time change.

TY 2013 Legal Fees Schedule

Name: Summa Peto Foundation

EIN: 94-3343213

Software ID: 13000170

Software Version: 2013v3.1

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Legal Fees	3,314	3,314	0	0

TY 2013 Other Expenses Schedule**Name:** Summa Peto Foundation**EIN:** 94-3343213**Software ID:** 13000170**Software Version:** 2013v3.1

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
CA Secretary of State	20	20		
Franchise Tax Board Annual Fee	10	10		

TY 2013 Other Professional Fees Schedule**Name:** Summa Peto Foundation**EIN:** 94-3343213**Software ID:** 13000170**Software Version:** 2013v3.1

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
First Republic Investment Advisory Fees	4,915	4,915	0	0

TY 2013 Taxes Schedule**Name:** Summa Peto Foundation**EIN:** 94-3343213**Software ID:** 13000170**Software Version:** 2013v3.1

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Excise Tax	127	127		
Foreign Tax on Dividends	12	12		

Recipient's Name and Address:SUMMA PETO FOUNDATION
ATTN MR. JOHN DOYLE**Account Number: A8L-004811**Recipient's Identification
Number 94-3343213**2013 TAX and
YEAR-END STATEMENT
As of 02/11/2014**

IMPORTANT MESSAGE: We send tax statements when information is finalized by securities issuers. If information is pending from issuers, you and members of your household may receive tax statement(s) at different times. Tax statement mailings will occur by January 31, February 18, February 28 and March 17, depending on when final information for your account is received from issuers. If you have any questions, please visit mytaxhandbook.com.

2013 Form 1099-B Proceeds From Broker and Barter Exchange Transactions OMB No. 1545-0715

(For individuals report details on Form 1040 Schedule D Line 1b, 2, 8b or 9)

This is important tax information and is being furnished to the Internal Revenue Service (except as indicated). If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

Disposition Transaction	Disposition Method	Quantity (Box 1e)	Date of Acquisition (Box 1b)	Date of Sale or Exchange (Box 1a)	Gross Proceeds Less Commissions and Option Premiums (Box 2a)	Cost or Other Basis (Box 3)	Adjustments W=Wash Sale Loss (Box 5) O=Option Premium	Realized Gain or (Loss)
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Short-Term Transactions for Which Basis Is Reported to the IRS - Report on Form 6949, Part I, with Box A checked.**Covered (Box 6b)****Description (Box 8):** BOEING CO COM

CUSIP: 097023105

Disposition Transaction	Disposition Method	Quantity (Box 1e)	Date of Acquisition (Box 1b)	Date of Sale or Exchange (Box 1a)	Gross Proceeds Less Commissions and Option Premiums (Box 2a)	Cost or Other Basis (Box 3)	Adjustments W=Wash Sale Loss (Box 5) O=Option Premium	Realized Gain or (Loss)
SELL	FIRST IN FIRST OUT	105	02/19/2013	10/22/2013	12,814.34	7,803.18		5,011.16

Description (Box 8): VANGUARD GNMA FUND

CUSIP: 922031307

SELL	FIRST IN FIRST OUT	1.627	08/31/2012	02/19/2013	17.64	18.06	0.01 W	(0.41)
SELL	FIRST IN FIRST OUT	8.295	09/28/2012	02/19/2013	89.92	92.16		(2.24)
SELL	FIRST IN FIRST OUT	2.378	11/30/2012	02/19/2013	25.78	26.18		(0.40)
SELL	FIRST IN FIRST OUT	0.99	12/28/2012	02/19/2013	1.07	1.08		(0.01)
SELL	FIRST IN FIRST OUT	0.78	12/28/2012	02/19/2013	0.85	0.85		0.00
SELL	FIRST IN FIRST OUT	0.38	12/31/2012	02/19/2013	0.41	0.42		(0.01)
SELL	FIRST IN FIRST OUT	0.38	01/31/2013	02/19/2013	0.41	0.41		0.00

Wash sale 172 day(s) added to holding period

SALE DATE TOTAL		12.553		VARIOUS	02/19/2013	136.08	139.16	(3.07)
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Short-Term Covered Total						12,950.42	7,942.34	5,008.09
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Recipient's Name and Address:

SUMMA PETO FOUNDATION
ATTN MR JOHN DOYLE

Account Number: A8L-004811

Recipient's Identification
Number 94-3343213

**2013 TAX and
YEAR-END STATEMENT**
As of 02/11/2014

2013 Form 1099-B **Proceeds From Broker and Barter Exchange Transactions** **OMB No. 1545-0715 (Continued)**
(For individuals report details on Form 1040 Schedule D Line 1b, 2, 8b or 9)

Disposition Transaction	Disposition Method	Quantity (Box 1e)	Date of Acquisition (Box 1b)	Date of Sale or Exchange (Box 1a)	Gross Proceeds Less Commissions and Option Premiums (Box 2a)	Cost or Other Basis (Box 3)	Adjustments W=Wash Sale Loss (Box 5) O=Option Premium	Realized Gain or (Loss)
Long-Term Transactions for Which Basis Is Reported to the IRS - Report on Form 8949, Part II, with Box D checked.								
Covered (Box 6b)								
Description (Box 8): AUTOLIV INC COM			CUSIP: 052800109					
SELL	FIRST IN FIRST OUT	140	07/12/2011	10/22/2013	13,049.66	9,937.20		3,112.46
Description (Box 8): CONOCOPHILLIPS COM			CUSIP: 20825C104					
SELL	FIRST IN FIRST OUT	580	07/12/2011	01/31/2013	33,752.05	33,340.60		411.45
Description (Box 8): GENERAL DYNAMICS CORP COM			CUSIP: 369550108					
SELL	FIRST IN FIRST OUT	592	07/12/2011	02/12/2013	39,621.67	43,243.88		(3,622.21)
Description (Box 8): GENERAL MILLS INC CO M			CUSIP: 370334104					
SELL	FIRST IN FIRST OUT	280	07/12/2011	10/22/2013	13,933.67	10,369.13		3,564.54
Description (Box 8): INTEL CORP COM			CUSIP: 458140100					
SELL	FIRST IN FIRST OUT	1,920	07/12/2011	02/12/2013	40,319.09	43,233.98		(2,914.89)
Description (Box 8): KLA-TENCOR CORP COM			CUSIP: 482480100					
SELL	FIRST IN FIRST OUT	1,057	07/12/2011	02/12/2013	59,782.58	43,239.65		16,542.93
Description (Box 8): VANGUARD GNMA FUND			CUSIP: 922031307					
SELL	FIRST IN FIRST OUT	6.918	10/31/2012	02/19/2013	74.99	77.34		(2.35)
	Wash sale 435 day(s) added to holding period							
SELL	FIRST IN FIRST OUT	1.537	10/31/2012	02/19/2013	16.66	17.18		(0.52)
	Wash sale 405 day(s) added to holding period							



Recipient's Name and Address:

SUMMA PETO FOUNDATION
ATTN MR JOHN DOYLE

Account Number: A8L-004811

Recipient's Identification
Number 94-3343213

**2013 TAX and
YEAR-END STATEMENT**
As of 02/11/2014

2013 Form 1099-B

Proceeds From Broker and Barter Exchange Transactions

OMB No. 1545-0715 (Continued)

(For individuals report details on Form 1040 Schedule D Line 1b, 2, 8b or 9)

Disposition Transaction	Disposition Method	Quantity (Box 1e)	Date of Acquisition (Box 1b)	Date of Sale or Exchange (Box 1a)	Gross Proceeds Less Commissions and Option Premiums (Box 2a)	Cost or Other Basis (Box 3)	Adjustments W=Wash Sale Loss (Box 5) O=Option Premium	Realized Gain or (Loss)
Long-Term Transactions for Which Basis Is Reported to the IRS - Report on Form 8949, Part II, with Box D checked.								
Covered (Box 6b) (continued)								
Description (Box 8): VANGUARD GNMA FUND			CUSIP: 922031307 (continued)					
SALE DATE TOTAL		8 455	VARIOUS	02/19/2013	91 65	94.52		(2.87)
Long-Term Covered Total					200,550.37	183,458.96		17,091.41
Covered Total					213,500.79	191,401.30		22,099.50
Long-Term Transactions for Which Basis Is Not Reported to the IRS - Report on Form 8949, Part II, with Box E checked.								
Noncovered (Box 6a)								
Description (Box 8): ARTIO GLOBAL HIGH IN COME FUND CLASS A			CUSIP: 04315J878					
SELL	FIRST IN FIRST OUT	1,890.359	09/28/2010	02/20/2013	20,000.00	20,576.18		(576.18)
SELL	FIRST IN FIRST OUT	592.105	09/28/2010	10/24/2013	6,300.00	6,444.94		(144.94)
SECURITY TOTAL					26,300.00	27,021.12		(721.12)
Description (Box 8): JP MORGAN STRATEGIC INCOME OPPORTUNITY F UND SELECT CLASS			CUSIP: 4812A4351					
SELL	FIRST IN FIRST OUT	528.967	09/30/2010	10/24/2013	6,300.00	6,199.49		100.51
Long-Term Noncovered Total					32,600.00	33,220.61		(620.61)
Noncovered Total					32,600.00	33,220.61		(620.61)
Total					246,100.79	224,621.91		21,478.89

IRS Form 1099-B - Proceeds from Broker and Barter Exchange Transactions

The amounts in this section of your Tax Information Statement reflect proceeds from securities transactions such as sales, redemptions, tender offers, return of principal distributions, the option premium portion of reverse convertibles and bond maturities. Short-term and long-term transactions are segregated in your 1099-B form in a format comparable to IRS Form 8949, for dispositions of covered and noncovered securities. Since your financial organization subscribes to our premium Tax and Year-End Statement, the date of acquisition, cost or other basis, type of gain or loss (long-term or short-term) and whether any loss is disallowed due to a wash sale for both covered and noncovered securities transactions will be displayed when available. Please note that such detail for noncovered transactions is not reported to the IRS.