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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

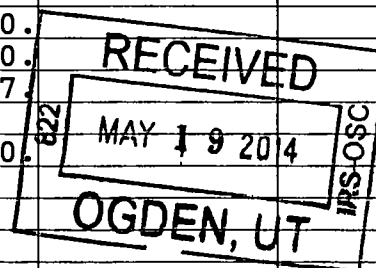
Open to Public Inspection

For calendar year 2013 or tax year beginning

, and ending

Name of foundation THE JULIA STEARNS DOCKWEILER CHARITABLE FOUNDATION		A Employer identification number 95-4830299
Number and street (or P.O. box number if mail is not delivered to street address) P.O. BOX 7597 DOCKWEILER STATION	Room/suite	B Telephone number (909) 394-1276
City or town, state or province, country, and ZIP or foreign postal code LOS ANGELES, CA 90007		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) \$ 7,848,054.	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					
4 Dividends and interest from securities		227,875.	227,875.		STATEMENT 1
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		303,529.			
b Gross sales price for all assets on line 6a 2,502,983.					
7 Capital gain net income (from Part IV, line 2)			303,529.		
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					
12 Total. Add lines 1 through 11		531,404.	531,404.		
13 Compensation of officers, directors, trustees, etc		66,000.	33,000.		13,200.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees STMT 2		7,337.	0.		0.
b Accounting fees STMT 3		24,100.	20,050.		4,050.
c Other professional fees STMT 4		52,239.	49,627.		2,612.
17 Interest					
18 Taxes STMT 5		3,558.	0.		0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses STMT 6		4,323.	0.		0.
24 Total operating and administrative expenses. Add lines 13 through 23		157,557.	102,677.		19,862.
25 Contributions, gifts, grants paid		337,500.			337,500.
26 Total expenses and disbursements. Add lines 24 and 25		495,057.	102,677.		357,362.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		36,347.			
b Net investment income (if negative, enter -0-)			428,727.		
c Adjusted net income (if negative, enter -0-)				N/A	



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Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only

			Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing	3,877.	32,139.	32,139.
	2	Savings and temporary cash investments	128,851.	316,213.	316,213.
	3	Accounts receivable ▶ 390.			
		Less: allowance for doubtful accounts ▶	1,923.	390.	390.
	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 STMT 7	959,528.	331,406.	329,885.
	b	Investments - corporate stock STMT 8	3,578,925.	3,705,301.	5,237,242.
	c	Investments - corporate bonds STMT 9	1,727,146.	1,963,345.	1,932,185.
Liabilities	11	Investments - land, buildings, and equipment basis ▶			
		Less accumulated depreciation ▶			
	12	Investments - mortgage loans			
	13	Investments - other			
	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)	6,400,250.	6,348,794.	7,848,054.
	17	Accounts payable and accrued expenses			
	18	Grants payable			
Net Assets or Fund Balances	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable			
	22	Other liabilities (describe ▶ DEFERRED INCOME)	5,041.	6,875.	
	23	Total liabilities (add lines 17 through 22)	5,041.	6,875.	
		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	7,095,502.	7,095,502.	
	28	Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29	Retained earnings, accumulated income, endowment, or other funds	<700,293.>	<753,583.>	
	30	Total net assets or fund balances	6,395,209.	6,341,919.	
	31	Total liabilities and net assets/fund balances	6,400,250.	6,348,794.	

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	6,395,209.
2	Enter amount from Part I, line 27a	2	36,347.
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	6,431,556.
5	Decreases not included in line 2 (itemize) ▶ BASIS ADJUSTMENT TO FUNDS	5	89,637.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	6,341,919.

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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 CHARLES SCHWAB (NOM. - 6114-2844)	P	VARIOUS	VARIOUS
b CHARLES SCHWAB (NOM. - 6114-2844)	P	VARIOUS	VARIOUS
c CAPITAL GAINS DIVIDENDS			
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 402,881.		421,632.	<18,751.>
b 2,099,581.		1,777,822.	321,759.
c 521.			521.
d			
e			

(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			<18,751.>
b			321,759.
c			521.
d			
e			

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	303,529.
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	360,210.	7,267,408.	.049565
2011	349,099.	7,307,419.	.047773
2010	339,035.	7,165,293.	.047316
2009	364,253.	6,921,711.	.052625
2008	390,951.	8,498,207.	.046004

2 Total of line 1, column (d)	2	.243283
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	.048657
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	7,520,082.
5 Multiply line 4 by line 3	5	365,905.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	4,287.
7 Add lines 5 and 6	7	370,192.
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	357,362.

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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	8,575.
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	8,575.
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	8,575.
6 Credits/Payments:			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	1,840.	
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	1,840.	
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	6,735.	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11 Enter the amount of line 10 to be: Credited to 2014 estimated tax ☐ Refunded ☐	11		

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
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

N/A

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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 ► LINDA NELSON, CPA Telephone no. ► (909) 394-1276 Located at ► 1475 PASEO MARAVILLA, SAN DIMAS, CA ZIP+4 ► 91773-3908			
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
SEE STATEMENT 10		66,000.	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 VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)

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

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

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

0

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

	Amount
1 N/A	
2	
All other program-related investments. See instructions.	
3	

Total. Add lines 1 through 3

0.

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	7,469,992.
b	Average of monthly cash balances	1b	164,609.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	7,634,601.
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	7,634,601.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	114,519.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	7,520,082.
6	Minimum investment return. Enter 5% of line 5	6	376,004.

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	376,004.
2a	Tax on investment income for 2013 from Part VI, line 5	2a	8,575.
b	Income tax for 2013. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	8,575.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	367,429.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	367,429.
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	367,429.

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	357,362.
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	357,362.
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	357,362.

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				367,429.
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only			337,026.	
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: ► \$ 357,362.				
a Applied to 2012, but not more than line 2a			337,026.	
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				20,336.
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				347,093.
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(j)(3) or ☐ 4942(j)(5)

	Tax year (a) 2013	Prior 3 years (b) 2012	(c) 2011	(d) 2010	(e) Total
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(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 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).)

NONE

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:

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				
BOOKENDS 2957 S. SEPULVEDA BLVD. LOS ANGELES, CA 90064	NONE	SEC. 501(C)(3)	COMMITMENT TO LITERACY	1,000.
BRaille AUXILIARY OF SANTA BARBARA P.O. BOX 5411 SANTA BARBARA, CA 93150	NONE	SEC. 501(C)(3)	BRaille CHALLENGE AND ESTABLISHING THE ORANGE COUNTY BRaille INSTITUTE	10,000.
BRaille INSTITUTE OF AMERICA 741 N. VERMONT AVE. LOS ANGELES, CA 90029	NONE	SEC. 501(C)(3)	BRaille INSTITUTE'S REGIONAL CENTER IN ORANGE COUNTY	5,000.
BRAIN INJURY NETWORK 1132 MAGNOLIA AVE. LARKSPUR, CA 94939	NONE	SEC. 501(C)(3)	UNRESTRICTED	1,000.
CAMBRIDGE IN AMERICA P.O. BOX 9123 JAF BLDG. NEW YORK, NY 10087	NONE	SEC. 501(C)(3)	SQUIRE LAW LIBRARY	1,000.
Total	SEE CONTINUATION SHEET(S)			337,500.
b Approved for future payment				
NONE				
Total				0.

Part XVII

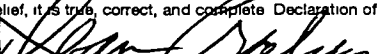
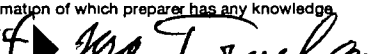
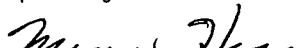
Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

		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		5-14-14 Date		 Title	
Paid Preparer Use Only	Print/Type preparer's name MIN HIGA		Preparer's signature 		Date 5/14/14	
	Check ☐ if self-employed		PTIN P01396466			
	Firm's name ▶ MARTIN WERBELOW LLP				Firm's EIN ▶ 95-1720829	
	Firm's address ▶ 300 N LAKE AVE, SUITE 930 PASADENA, CA 91101-4106				Phone no. (626) 577-1440	

**THE JULIA STEARNS DOCKWEILER
CHARITABLE FOUNDATION**

95-4830299

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
CLAREMONT INSTITUTE FOR THE STUDY OF STATESMANSHIP & POLITICAL PHILOSOPHY 937 W. FOOTHILL BLVD., STE E CLAREMONT, CA 91711	NONE	SEC. 501(C)(3)	UNRESTRICTED	2,000.
CONGREGATION OF THE MISSION WESTERN PROVINCE 649 WEST ADAMS BLVD. LOS ANGELES, CA 90007	NONE	SEC. 501(C)(3)	SCHOLARSHIP ASSISTANCE TO SEMINARIANS	15,000.
DIRECT RELIEF INTERNATIONAL 27 S. LA PATERA LANE SANTA BARBARA, CA 93117	NONE	SEC. 501(C)(3)	DOMESTIC PROGRAMS	10,000.
EXCEPTIONAL MINDS 13400 RIVERSIDE DR. #211 SHERMAN OAKS, CA 91423	NONE	SEC. 501(C)(3)	75% FOR SCHOLARSHIPS AND 25% FOR JOB COACHES	25,000.
FREEDOM ALLIANCE 22570 MARKEY COURT DULLES, VA 20166	NONE	SEC. 501(C)(3)	FREEDOM ALLIANCE SCHOLARSHIP FUND	5,000.
GUIDE DOGS FOR THE BLIND P.O. BOX 151200 SAN RAFAEL, CA 94915	NONE	SEC. 501(C)(3)	VETERINARIAN SERVICES FOR GUIDE DOGS	5,000.
HILLSDALE COLLEGE 33 E. COLLEGE ST. HILLSDALE, MI 49242	NONE	SEC. 501(C)(3)	"PRINCIPLES OF FREE MARKET ECONOMICS" ON-LINE COURSE	2,000.
HOMEBOY INDUSTRIES 130 W. BRUNO STREET LOS ANGELES, CA 90012	NONE	SEC. 501(C)(3)	TATOO REMOVAL PROGRAM	10,000.
HOSPITALER FOUNDATION OF CALIFORNIA, INC. 2468 S. ST. ANDREWS PLACE LOS ANGELES, CA 90018	NONE	SEC. 501(C)(3)	CARE OF PATIENTS WITH ALZHEIMER'S DISEASE	10,000.
HOWARD CENTER 934 NORTH MAIN STREET ROCKFORD, IL 61103	NONE	SEC. 501(C)(3)	SUPPORT THE FAMILY IN AMERICA PUBLICATIONS	5,000.
Total from continuation sheets				319,500.

THE JULIA STEARNS DOCKWEILER
CHARITABLE FOUNDATION

95-4830299

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
HUNTINGTON LIBRARY 1151 OXFORD ROAD SAN MARINO, CA 91108	NONE	SEC. 501(C)(3)	SUPPORT OF LIBRARY ACQUISITION	5,000.
JESUITS, CALIFORNIA PROVINCE P.O. BOX 68 LOS GATOS, CA 95031	NONE	SEC. 501(C)(3)	GENERATIONS THE CAMPAIGN	20,000.
L.A. MUSIC CENTER FOUNDERS 135 N. GRAND AVE. LOS ANGELES, CA 90012-2616	NONE	SEC. 501(C)(3)	UNRESTRICTED	1,000.
L.A. ORPHANAGE GUILD, MARYVALE 1437 CLUB VIEW DR. LOS ANGELES, CA 90024	NONE	SEC. 501(C)(3)	UNRESTRICTED	10,000.
L.A. PHILHARMONIC YOLA 151 SOUTH GRAND AVENUE LOS ANGELES, CA 90012	NONE	SEC. 501(C)(3)	YOUTH ORCHESTRA LOS ANGELES PROGRAM	10,000.
LAS MADRINAS 122 SOUTH PLYMOUTH LOS ANGELES, CA 90004	NONE	SEC. 501(C)(3)	STUDY AND TREATMENT OF AUTISM AT CHILDREN'S HOSPITAL	12,000.
LIVING DESERT 47900 PORTOLA AVE. PALM DESERT, CA 92260	NONE	SEC. 501(C)(3)	SUPPORT FOR VETERINARY SERVICES	3,000.
LOYOLA HIGH SCHOOL SCHOLARSHIP 1901 VENICE BLVD. LOS ANGELES, CA 90006-4401	NONE	SEC. 501(C)(3)	SCHOLARSHIP ENDOWMENT	10,000.
LOYOLA MARYMOUNT UNIVERSITY - ARCHIVES AND SPECIAL COLLECTIONS 1 LMU DRIVE, SUITE 2800 LOS ANGELES, CA 90045-2659	NONE	SEC. 501(C)(3)	PRESERVATION OF ART AND LITERATURE	5,000.
LOYOLA MARYMOUNT UNIVERSITY - BELLARMINI COLLEGE 1 LMU DRIVE, SUITE 2800 LOS ANGELES, CA 90045-2659	NONE	SEC. 501(C)(3)	SCHOLARSHIP ENDOWMENT	5,000.
Total from continuation sheets				

**THE JULIA STEARNS DOCKWEILER
CHARITABLE FOUNDATION**

95-4830299

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
LOYOLA MARYMOUNT UNIVERSITY HISTORY DEPT. (HENRY DOCKWEILER) 1 LMU DRIVE, SUITE 2800 LOS ANGELES, CA 90045-2659	NONE	SEC. 501(C)(3)	HENRY DOCKWEILER HISTORY MEDAL	1,000.
MARYMOUNT HIGH SCHOOL 10643 SUNSET BLVD LOS ANGELES, CA 90077	NONE	SEC. 501(C)(3)	SCHOLARSHIP PROGRAM IN MEMORY OF JULIA STEARNS DOCKWEILER '35	5,000.
MUSIC ACADEMY OF THE WEST 1070 FAIRWAY ROAD SANTA BARBARA, CA 93108	NONE	SEC. 501(C)(3)	SCHOLARSHIP	25,000.
PASADENA CONSERVANCY OF MUSIC 100 N. HILL AVE. #105 PASADENA, CA 91106	NONE	SEC. 501(C)(3)	FINANCIAL AID AND MERIT PROGRAM	5,000.
RONALD REAGAN LIBRARY FOUNDATION 40 PRESIDENTIAL DRIVE SIMI VALLEY, CA 93065	NONE	SEC. 501(C)(3)	EDUCATIONAL AND SPEAKER PROGRAMS	2,000.
SANTA CLARA UNIVERSITY 500 EL CAMINO REAL SANTA CLARA, CA 95053-1400	NONE	SEC. 501(C)(3)	PRESIDENT'S ENDOWED SCHOLARSHIP FUND	5,000.
SEE INTERNATIONAL 6950 HOLLISTER AVE., SUITE A SANTA BARBARA, CA 93117	NONE	SEC. 501(C)(3)	AQUIRING LASER EQUIPMENT FOR DIABETIC RETINOPATHY	25,000.
SISTER SERVANTS OF MARY 2131 WEST 27TH ST. LOS ANGELES, CA 90018-3018	NONE	SEC. 501(C)(3)	UNRESTRICTED	10,000.
ST. VINCENT'S MEDICAL CENTER AUXILARY 2131 WEST THIRD STREET LOS ANGELES, CA 90057-0992	NONE	SEC. 501(C)(3)	UNRESTRICTED	5,000.
USC CARUSO CATHOLIC CENTER 3163 S. HOOVER ST. LOS ANGELES, CA 90007	NONE	SEC. 501(C)(3)	UNRESTRICTED	1,500.
Total from continuation sheets				

**THE JULIA STEARNS DOCKWEILER
CHARITABLE FOUNDATION**

95-4830299

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
USC HISTORIC COLLECTION LIBRARY 1ST CENTURY FAMILIES USC DML 100 LOS ANGELES, CA 90089-0182	NONE	SEC. 501(C)(3)	COLLECTION AND PRESERVATION OF MEMORABILIA AND WRITINGS OF FIRST CENTURY FAMILIES	5,000.
USC NORRIS CANCER CENTER 1441 EASTLAKE AVE. STE 8302 LOS ANGELES, CA 90089-9181	NONE	SEC. 501(C)(3)	CANCER RESEARCH	20,000.
VERBUM DEI HIGH SCHOOL 11100 SOUTH CENTRAL AVE. LOS ANGELES, CA 90059	NONE	SEC. 501(C)(3)	VERBUM DEI SCHOLARSHIP ENDOWMENT FUND	20,000.
WOUNDED WARRIOR PROJECT 7020 A.C. SKINNER PARKWAY, SUITE 100 JACKSONVILLE, FL 32256	NONE	SEC. 501(C)(3)	SCHOLARSHIPS FOR WOUNDED VETERANS ATTENDING INFORMATION TECHNOLOGY TRAINING	10,000.
YOUNG AMERICA'S FOUNDATION 217 STATE STREET SANTA BARBARA, CA 93101	NONE	SEC. 501(C)(3)	EDUCATIONAL PROGRAMS AND REAGAN RANCH ROUNDTABLE	10,000.
Total from continuation sheets				

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES				STATEMENT 1
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
CHARLES SCHWAB #2844	235,481.	521.	234,960.	234,960.	
CHARLES SCHWAB #2844 OID	2,638.	0.	2,638.	2,638.	
LESS ACCRUED INTEREST PAID	<9,723.>	0.	<9,723.>	<9,723.>	
TO PART I, LINE 4	228,396.	521.	227,875.	227,875.	

FORM 990-PF	LEGAL FEES			STATEMENT 2
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	7,337.	0.		0.
TO FM 990-PF, PG 1, LN 16A	7,337.	0.		0.

FORM 990-PF	ACCOUNTING FEES			STATEMENT 3
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING & BOOKKEEPING	24,100.	20,050.		4,050.
TO FORM 990-PF, PG 1, LN 16B	24,100.	20,050.		4,050.

FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
COVINGTON ADVISORY FEES	52,239.	49,627.		2,612.
TO FORM 990-PF, PG 1, LN 16C	52,239.	49,627.		2,612.

FORM 990-PF	TAXES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES	1,348.	0.		0.
FILING FEES	85.	0.		0.
EXCISE TAX	2,125.	0.		0.
TO FORM 990-PF, PG 1, LN 18	3,558.	0.		0.

FORM 990-PF	OTHER EXPENSES	STATEMENT	6
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
OFFICE EXPENSE	2,055.	0.		0.
POSTAGE & P.O. BOX	300.	0.		0.
INSURANCE	750.	0.		0.
BANK FEES	199.	0.		0.
ADR FEES	174.	0.		0.
MEMBERSHIP FEES	725.	0.		0.
TRUSTEE TRAVEL	100.	0.		0.
MEETING EXPENSE	20.	0.		0.
TO FORM 990-PF, PG 1, LN 23	4,323.	0.		0.

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS	STATEMENT	7
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DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
CHARLES SCHWAB U.S. OBLIGATIONS	X		173,801.	166,742.
CHARLES SCHWAB MUNI. BONDS		X	157,605.	163,143.
TOTAL U.S. GOVERNMENT OBLIGATIONS			173,801.	166,742.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS			157,605.	163,143.
TOTAL TO FORM 990-PF, PART II, LINE 10A			331,406.	329,885.

FORM 990-PF	CORPORATE STOCK	STATEMENT	8
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CHARLES SCHWAB EQUITIES	3,705,301.	5,237,242.
TOTAL TO FORM 990-PF, PART II, LINE 10B	3,705,301.	5,237,242.

FORM 990-PF	CORPORATE BONDS	STATEMENT	9
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CHARLES SCHWAB FIXED INCOME SECURITIES	1,963,345.	1,932,185.
TOTAL TO FORM 990-PF, PART II, LINE 10C	1,963,345.	1,932,185.

FORM 990-PF

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

STATEMENT 10

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
CARYL CRAHAN 830 WOODLAND DRIVE SANTA BARBARA, CA 93108	TRUSTEE 1.00	12,000.	0.	0.
C. QUINN BRADY, JR 48-537 VISTA PALOMINO LA QUINTA, CA 92253	TRUSTEE 1.00	12,000.	0.	0.
BETTY BRADY 48-537 VISTA PALOMINO LA QUINTA, CA 92253	TRUSTEE 1.00	12,000.	0.	0.
MICHELLE CRAHAN 156 S. LUCERNE BLVD. LOS ANGELES, CA 90004	TRUSTEE 1.00	12,000.	0.	0.
SEAN CRAHAN 3105 SPARR BLVD. GLENDALE, CA 91208	TRUSTEE 2.00	18,000.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		66,000.	0.	0.