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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 03-01-2013 , and ending 02-28-2014

Name of foundation E C FULLER TRUST UART 16		A Employer identification number 06-6020257	
Number and street (or P O box number if mail is not delivered to street address) 1525 W WT HARRIS BLVD D1114-044		B Telephone number (see instructions) (855) 769-2920	
City or town, state or province, country, and ZIP or foreign postal code CHARLOTTE, NC 28262		C If exemption application is pending, check here <input type="checkbox"/>	
G Check all that apply <div><input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change</div> <div><input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change</div>		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <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		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) <input checked="" type="checkbox"/> \$ 14,416,599		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
J Accounting method <input type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)			

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
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	63	63		
	4 Dividends and interest from securities.	345,991	343,444		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	580,562			
	b Gross sales price for all assets on line 6a 4,218,261				
	7 Capital gain net income (from Part IV, line 2) . . .		580,562		
	8 Net short-term capital gain			0	
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	650			
	12 Total. Add lines 1 through 11	927,266	924,069		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	144,756	94,373		50,383
	14 Other employee salaries and wages		0	0	0
	15 Pension plans, employee benefits		0	0	
	16a Legal fees (attach schedule)	4,800	0	0	4,800
	b Accounting fees (attach schedule)	1,000	0	0	1,000
	c Other professional fees (attach schedule)				0
	17 Interest				0
	18 Taxes (attach schedule) (see instructions)	30,128	308		0
	19 Depreciation (attach schedule) and depletion . . .	0	0		
	20 Occupancy				
	21 Travel, conferences, and meetings		0	0	
	22 Printing and publications		0	0	
	23 Other expenses (attach schedule)	863			863
	24 Total operating and administrative expenses. Add lines 13 through 23	181,547	94,681	0	57,046
	25 Contributions, gifts, grants paid	500,000			500,000
	26 Total expenses and disbursements. Add lines 24 and 25	681,547	94,681	0	557,046
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	245,719			
	b Net investment income (if negative, enter -0-)		829,388		
	c Adjusted net income (if negative, enter -0-)			0	

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			
	2	Savings and temporary cash investments	597,075	1,452,059	1,452,059
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____		0	0
	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 ▶ _____ 0			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)		 605,779	606,175
	b	Investments—corporate stock (attach schedule)	2,321,193	 3,104,334	8,453,682
	c	Investments—corporate bonds (attach schedule).		 3,723,256	3,904,683
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	5,721,460		0
	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)	8,639,728	8,885,428	14,416,599	
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 type="checkbox"/> 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 ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds	8,639,728	8,885,428	
	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)	8,639,728	8,885,428	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	8,639,728	8,885,428	

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	8,639,728
2	Enter amount from Part I, line 27a	2	245,719
3	Other increases not included in line 2 (itemize) ▶ 	3	12,553
4	Add lines 1, 2, and 3	4	8,898,000
5	Decreases not included in line 2 (itemize) ▶ 	5	12,572
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	8,885,428

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	See Additional Data Table			
b				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a See Additional Data Table			
b			
c			
d			
e			

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) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a See Additional Data Table			
b			
c			
d			
e			

2	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	580,562
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) (see instructions) If (loss), enter -0- in Part I, line 8		3	

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	141,518	13,142,737	0 010768
2011	639,321	12,554,802	0 050922
2010	548,962	12,220,042	0 044923
2009	599,055	11,650,481	0 051419
2008	591,595	12,112,322	0 048842

2	Total of line 1, column (d).	2	0 206874
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	0 041375
4	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.	4	14,053,442
5	Multiply line 4 by line 3.	5	581,461
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	8,294
7	Add lines 5 and 6.	7	589,755
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	557,046

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		
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 type="checkbox"/> and enter 1% of Part I, line 27b	1	16,588
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	16,588
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	16,588
6 Credits/Payments		
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	17,248
b Exempt foreign organizations—tax withheld at source	6b	
c Tax paid with application for extension of time to file (Form 8868)	6c	0
d Backup withholding erroneously withheld	6d	
7 Total credits and payments. Add lines 6a through 6d.	7	17,248
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached.	8	0
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	660
11 Enter the amount of line 10 to be Credited to 2014 estimated tax 660 Refunded	11	0

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?	1a	Yes	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 <input type="checkbox"/> \$ _____ (2) On foundation managers <input type="checkbox"/> \$ _____			
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ _____			
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		
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	Yes	
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) <input type="checkbox"/> CT			
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				
14	The books are in care of WELLS FARGO BANK Telephone no (855) 739-2920 Located at 1 W 4TH STREET D4000-062 WINSTONSALEM NC ZIP +4 271013818			
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. 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? 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). 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.). 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 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?			
		1b		No
		1c		No
		2b		No
		3b		
		4a		No
		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 checked="" type="checkbox"/> Yes	<input 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		

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
WELLS FARGO BANK	TRUSTEE	132,756		
1525 WEST WT HARRIS BLVD	40			
CHARLOTTE, NC 282881114				
VINCENT T MARCHESI MD	CO-FIDUCIARY	12,000		
179 PROSPECT AVE	15			
GUILFORD, CT 06437				
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
Total number of other employees paid over \$50,000.				0

Part VIII

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

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services.		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	
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	13,423,124
b	Average of monthly cash balances.	1b	844,330
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	14,267,454
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	14,267,454
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	214,012
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	14,053,442
6	Minimum investment return. Enter 5% of line 5.	6	702,672

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	702,672
2a	Tax on investment income for 2013 from Part VI, line 5.	2a	16,588
b	Income tax for 2013 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	16,588
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	686,084
4	Recoveries of amounts treated as qualifying distributions.	4	650
5	Add lines 3 and 4.	5	686,734
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	686,734

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	557,046
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	0
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	0
b	Cash distribution test (attach the required schedule).	3b	0
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	557,046
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	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	557,046
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				686,734
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only.			512,292	
b Total for prior years 2011 , 20__ , 20__		0		
3 Excess distributions carryover, if any, to 2013				
a From 2008.				0
b From 2009.				0
c From 2010.				0
d From 2011.				0
e From 2012.				0
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 557,046				
a Applied to 2012, but not more than line 2a			512,292	
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.				44,754
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 instructions			0	
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014				641,980
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions).	0			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions). . .	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. . . .				0
b Excess from 2010. . . .				0
c Excess from 2011. . . .				0
d Excess from 2012. . . .				0
e Excess from 2013. . . .				0

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

1a

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 organization is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed.	Tax year	Prior 3 years			(e) Total
		(a) 2013	(b) 2012	(c) 2011	(d) 2010	
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 XVSupplementary 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:

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))

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

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 <i>Paid during the year</i> DANA FARBER CANCER INSTITUTE 44 BINNEY STREET BOSTON, MA 02115	NONE	PC	CANCER RESEARCH	200,000
OREGON HEALTH & SCIENCE UNIV 3181 SW SAM JACKSON PARK RD PORTLAND, OR 97239	NONE	PC	MEDICAL RESEARCH	100,000
ECOLE POLYTECHIQUE FEDERALE DE LAUSANNE SV 283 SATION 19 CH-1015 LAUSANNE SZ	NONE	PC	MEDICAL RESEARCH	100,000
MEMORIAL SLOAN-KETTERING CANCER CENTER 1275 YORK AVE NEW YORK, NY 10065	NONE	PC	MEDICAL RESEARCH	100,000
Total			 3a	500,000
b <i>Approved for future payment</i>				
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 IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
1490 ABBVIE INC		1978-05-24	2013-05-07
5055 ABBVIE INC		1978-05-24	2013-12-10
110 APPLE COMPUTER INC COM		2013-05-07	2013-06-19
27001 942 ABERDEEN TOTAL RETURN BD FD-I #1524		2011-12-27	2013-07-11
3579 098 ABERDEEN TOTAL RETURN BD FD-I #1524		2012-07-27	2013-07-11
102043 079 ABERDEEN TOTAL RETURN BD FD-I #1524		2012-08-15	2014-01-27
2040 CISCO SYS INC COM W/RIGHTS ATTACHED EXPIRING 6/10/2008		2013-07-11	2013-08-30
1765 COACH INC COM W/RTS ATTACHED EXP 5/2/2011		2013-07-11	2013-08-30
4677 268 LAUDUS MONDRIAN INT GV FI-INST #2940		2009-05-22	2013-07-11
12449 503 PIMCO FDS PAC INVT MGMT SER HIGH YLD FD INSTL CL		2012-05-03	2013-07-11
19162 72 PIMCO FDS PAC INVT MGMT SER HIGH YLD FD INSTL CL		2012-08-15	2013-07-11
105820 106 PIMCO TOTAL RETURN III-INSTL #105		2012-08-15	2014-01-27
1500 PEPSICO INC COM		2003-04-23	2013-12-10
2000 QUALCOMM INC COM W/RTS ATTACHED		2011-10-20	2013-05-07
1050 VERIZON COMMUNICATIONS COM		1993-01-06	2013-12-10
1900 ACCENTURE PLC		2011-10-20	2013-05-07
CAPITAL GAIN DIVIDENDS	P		

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
66,603		759	65,844
262,790		2,575	260,215
46,851		66,734	-19,883
353,185		376,242	-23,057
46,815		50,000	-3,185
1,333,703		1,346,398	-12,695
47,453		52,775	-5,322
93,076		103,231	-10,155
50,000		51,310	-1,310
118,146		116,262	1,884
181,854		180,000	1,854
1,000,000		989,458	10,542
124,099		64,245	59,854
127,820		104,639	23,181
51,502		24,156	27,346
150,247		108,915	41,332
			164,117

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			65,844
			260,215
			-19,883
			-23,057
			-3,185
			-12,695
			-5,322
			-10,155
			-1,310
			1,884
			1,854
			10,542
			59,854
			23,181
			27,346
			41,332

TY 2013 Accounting Fees Schedule

Name: E C FULLER TRUST UART 16

EIN: 06-6020257

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX PREPARATION FEE (NON-ALLOC	1,000			1,000

TY 2013 Investments Corporate
 Bonds Schedule

Name: E C FULLER TRUST UART 16
 EIN: 06-6020257

Name of Bond	End of Year Book Value	End of Year Fair Market Value
36962G2L7 GEN ELEC CAP CORP		
055451AT5 BHP BILLITON FIN USA	25,270	25,304
05565QCG1 BP CAPITAL MARKETS	25,446	25,402
06406HBX6 BANK OF NEW YORK MEL	25,914	25,861
064149C47 BANK OF NOVA SCOTIA	25,654	25,643
084664BY6 BERKSHIRE HATHAWAY	25,328	25,307
136069FA4 CANADIAN IMPERIAL BA	24,930	24,849
14912L4X6 CATERPILLAR FINANCIA	25,784	25,758
24422ERC5 JOHN DEERE CAPITAL	25,902	25,891
268648AP7 EMC CORP	25,118	25,054
30249UAA9 FMC TECHNOLOGIES INC	25,240	25,072
354613AF8 FRANKLIN RESOURCES	25,831	25,769
36962G5F7 GENERAL ELEC CAP COR	25,645	25,637
38141GRC0 GOLDMAN SACHS GROUP	25,368	25,347
40428HPJ5 HSBC USA INC	25,771	25,686
406216BC4 HALLIBURTON COMPANY	25,351	25,268
428236BW2 HEWLETT-PACKARD CO	25,793	25,840
46625HJG6 JPMORGAN CHASE & CO	25,048	25,036
487836BH0 KELLOGG CO	25,345	25,260
494550BR6 KINDER MORGAN ENER	25,158	25,147
50540RAM4 LAB CORP OF AMER HLD	25,310	25,118
51855Q655 LAUDUS MONDRIAN INTL	98,363	97,735
61166WAM3 MONSANTO CO	25,094	25,043
693390304 PIMCO LOW DURATION F	550,000	560,087
693390841 PIMCO HIGH YIELD FD-	446,538	587,407
693390866 PIMCO TOTAL RETURN I	812,516	849,004
741478101 T ROWE CORPORATE INC	178,000	171,239
74340XAV3 PROLOGIS LP	25,317	25,248
76628T678 RIDGEWORTH SEIX FLOA	100,000	100,777
78008S7D2 ROYAL BANK OF CANADA	25,419	25,398
822582BA9 SHELL INTERNATIONAL	25,300	25,267
85771PAR3 STATOIL ASA	25,182	25,177
89152UAE2 TOTAL CAPITAL SA	25,862	25,889
89233P5S1 TOYOTA MOTOR CREDIT	25,829	25,825
904764AQ0 UNILEVER CAPITAL COR	25,275	25,247
91159HGX2 US BANCORP	25,722	25,700
913017BU2 UNITED TECHNOLOGIES	25,582	25,535
921937827 VANGUARD SHORT TERM	574,051	573,654
94987W752 WFA SHRT TRM HI YLD-	200,000	202,202

TY 2013 Investments Corporate
Stock Schedule

Name: E C FULLER TRUST UART 16
EIN: 06-6020257

Name of Stock	End of Year Book Value	End of Year Fair Market Value
437076102 HOME DEPOT INC	48,683	157,908
580135101 MCDONALDS CORP		
778296103 ROSS STORES INC	107,097	276,640
191216100 COCA COLA CO	4,485	210,100
713448108 PEPSICO INC		
742718109 PROCTER & GAMBLE CO	18,360	511,290
166764100 CHEVRON CORP	86,766	479,773
30231G102 EXXON MOBIL CORPORAT	15,998	567,993
060505104 BANK OF AMERICA CORP		
46625H100 JPMORGAN CHASE & CO	14,547	715,080
002824100 ABBOTT LABS	5,167	437,580
478160104 JOHNSON & JOHNSON		
369604103 GENERAL ELECTRIC CO	324	305,640
88579Y101 3M CO	42,765	90,943
428236103 HEWLETT PACKARD CO		
458140100 INTEL CORP	63,286	81,708
459200101 INTERNATIONAL BUSINE	165,634	611,061
594918104 MICROSOFT CORP	61,868	91,944
68389X105 ORACLE CORPORATION	106,042	144,707
693506107 PPG INDUSTRIES INC	30,882	128,583
00206R102 AT & T INC	48,125	127,720
92343V104 VERIZON COMMUNICATIO	128,777	277,391
65339F101 NEXTERA ENERGY INC	51,300	274,170
87612E106 TARGET CORP	107,598	125,080
747525103 QUALCOMM INC		
00287Y109 ABBVIE INC	2,269	226,804
037833100 APPLE INC	240,034	247,333
14040H105 CAPITAL ONE FINANCIA	58,411	77,102
26203E836 DREYFUS/THE BOSTON C	120,190	199,440
339128100 JP MORGAN MID CAP VA	282,000	372,480

Name of Stock	End of Year Book Value	End of Year Fair Market Value
780905451 ROYCE PREMIER FUND W	119,574	226,064
92934R769 CRM MID CAP VALUE FD	155,884	286,849
G1151C101 ACCENTURE PLC		
H0023R105 ACE LIMITED	107,728	176,166
037411105 APACHE CORP	51,539	46,385
12572Q105 CME GROUP INC	35,582	34,326
17275R102 CISCO SYSTEMS INC	118,448	124,042
189754104 COACH INC	77,925	67,602
375558103 GILEAD SCIENCES INC	138,586	178,826
478366107 JOHNSON CONTROLS INC	82,643	111,150
611740101 MONSTER BEVERAGE COR	85,392	109,520
637071101 NATIONAL OILWELL INC	35,953	37,750
806857108 SCHLUMBERGER LTD	47,871	54,870
872540109 TJX COS INC NEW	52,349	51,626
907818108 UNION PACIFIC CORP	85,944	100,111
91324P102 UNITEDHEALTH GROUP I	62,530	70,702
G29183103 EATON CORP PLC	35,778	39,223

TY 2013 Investments Government Obligations Schedule

Name: E C FULLER TRUST UART 16

EIN: 06-6020257

**US Government Securities - End of
Year Book Value:**

605,779

**US Government Securities - End of
Year Fair Market Value:**

606,175

**State & Local Government
Securities - End of Year Book
Value:**

**State & Local Government
Securities - End of Year Fair
Market Value:**

TY 2013 Investments - Other Schedule**Name:** E C FULLER TRUST UART 16**EIN:** 06-6020257

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
04315J209 ARTIO TOTAL RETURN B			
51855Q655 LAUDUS MONDRIAN INTL			
693390304 PIMCO LOW DURATION F			
693390841 PIMCO HIGH YIELD FD-			
693390866 PIMCO TOTAL RETURN I			
921937850 VANGUARD SHORT-TERM			
H0023R105 ACE LIMITED			
92934R769 CRM MID CAP VALUE			
26203E836 DREYFUS/THE BOSTON C			
38142Y401 GOLDMAN SACHS GROWTH			
780905451 ROYCE PREMIER FUND			
G1151C101 ACCENTURE PLC			
741478101 T ROWE CORPORATE INC			
921937827 VANGUARD SHORT TERM			

TY 2013 Legal Fees Schedule

Name: E C FULLER TRUST UART 16

EIN: 06-6020257

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES - PRINCIPAL (ALLOCA	4,800			4,800

TY 2013 Other Decreases Schedule**Name:** E C FULLER TRUST UART 16**EIN:** 06-6020257

Description	Amount
MUTUAL FUND TAX EFFECTIVE DATE AFTER TYE	5,814
ROC ADJUSTMENT	2,360
ACCRUED INTEREST PAID EFFECTIVE DATE AFTER TYE	4,398

TY 2013 Other Expenses Schedule

Name: E C FULLER TRUST UART 16

EIN: 06-6020257

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PROBATE COURT EXPENSES	863	0		863

TY 2013 Other Income Schedule

Name: E C FULLER TRUST UART 16

EIN: 06-6020257

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
RECOVERY	650	0	

TY 2013 Other Increases Schedule**Name:** E C FULLER TRUST UART 16**EIN:** 06-6020257

Description	Amount
MUTUAL FUND TAX EFFECTIVE DATE BEFORE TYE	12,549
ROUNDING	4

TY 2013 Taxes Schedule**Name:** E C FULLER TRUST UART 16**EIN:** 06-6020257

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES	308	308		0
FEDERAL TAX PAYMENT - PRIOR YE	12,572	0		0
FEDERAL ESTIMATES - PRINCIPAL	17,248	0		0