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Form **990-PF**

Return of Private Foundation

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

▶ Do not enter Social Security numbers on this form as it may be made public. ▶ Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf. OMB No 1545-0052

		t of the Treasury venue Service	.				ecurity numbers F and its separa						Dof.	Open to Public	nspection
		idar year 2013			JUN		2013		, and e		MAY		2014		speciion_
		foundation											entification		
N	OR	TH TEXA	S EST	ATE A	ND FIN	IANC)	AL				'	•			
		ANNING									7	<u>5-24</u>	91461		
		and street (or PO t		f mail is not d	elivered to street	address)				Room/suite	1	phone nu			
		BOX 970								L	(<u>940)</u>	<u>723-1</u>	471	. —
		own, state or pr					de				C If exe	emption ap	plication is p	ending, check here	
		HITA FA (all that apply:	<u>, 2, 1, 1</u>	TX 7	<u> 76307-7</u>		Initial return of	forma	r public (aharit.	ļ, , [01010D 01	annizations	s abaak bara	$\overline{}$
u	, IIIGU	an mat apply.	Ħ	Final return			Amended return		i public (ilanty	יי ען ייי	oreign or	yarnzanons	s, check here	
			一	Address ch		Ħ	Name change	•			2 F	oreign orga	enizations me	eting the 85% test, mputation	ightharpoonup
H (Check	type of organiz	ration:			xempt pr	vate foundation							tus was terminate	d
] Se	ction 4947(a)(1					kable private four	ndation						(A), check here	` ▶□
I Fa	ıır ma	arket value of all	assets at e	nd of year	J Account	ing meth	od: X Casi	ı [Accr	rual	F If th	e foundat	tion is in a (60-month termina	ition
		Part II, col (c),				ther (spe					und	er sectior	n 50 7(b)(1)	(B), check here	
_	\$	Analysis of D			· 		nust be on cas	h basis	s)		-			·	
Pa	<u>irt l</u>	☐ (The total of amount of amoun	ounts in colur	mns (b), (c), ar	nd (d) may not	(a)	Revenue and enses per books	(ivestment ome	(0	Adjuste (: Incom		(d) Disburser for charitable pu	irposes
	1	contributions,		<u> </u>		- OAP	ondoo per books					11100111		(cash basis o	only)
	2	Check X				<u> </u>					 				
-	3	Interest on saving	as and tempo				1			1.	 			STATEMEN	TT 1
7: n7	4	Dividends and		m securitie	S			1 -							·
าว	5a	Gross rents					_								
V	b	Net rental income	or (loss)				 	4.							
_ e	6a	Net gain or (loss) Gross sales price		assets not on	line 10			_			ļ				
UC Revenue	_b	assets on line 6a						+-			<u> </u>				
· é	7 8	Capital gain net ii Net short-term				-				0.					
. ;	å	Income modifi	, ,	11				+							
, ,	10a	Gross sales less						_							
*	Ь	Less Cost of good	ods sold												
R B	C	Gross profit or	(loss)												
4.5	11	Other income									ļ				
	12	Total Add line					1	_		1.	ļ		0.		
	13	Compensation of			s, etc		0	•		0.	<u> </u>	_	0.		0.
	15	Other employe Pension plans,		•					<u> </u>		ļ		,		
es	l	Legal fees	, citipioyee	DUTIONIS						RECE	VEI)	 		
ens	ı	Accounting fee	es						68			၂၀			
Expenses	ı	Other profession							-2	OCI 20	2014	080	ļ		
Administrative	17	Interest							Ü			IRS			
trat	18	Taxes						$\perp \downarrow$		GDFN		- -			
iris	19	Depreciation a	nd depletio	n				ŧ		UDLI	<u>, U</u>	1	}		
Ę	20	Occupancy													
and A	21 22	Travel, confere		neeungs							 				
g	23	Other expenses		ST	MT 2		90			0.	 		0.		0.
atin	24	Total operatin						•							
Operating		expenses Add	-			<u></u>	90	•		0.			0.		0.
Õ	25	Contributions,		-			0								0.
	26	Total expense		ursements											
	<u> </u>	Add lines 24 a				 	90	-		0.	<u> </u>		0.		<u> 0 </u>
	l	Subtract line 2					.00								
		Excess of revenue				-	<89	••		1.	 			<u> </u>	
		Net investment Adjusted net in								<u></u>	 		0.	<u></u>	
3235 10-1	01 0-13				t Notice, see	instructi	ons				1			Form 990-F	PF (2013)

75-2491461

PLANNING COUNCIL INC

Form 990-PF (2013)

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 $4,\overline{469}$ 4,474. 4,469. 1 Cash - non-interest-bearing 9,600. 9,516. 9,516. 2 Savings and temporary cash investments 3 Accounts receivable ► Less: allowance for doubtful accounts 4 Pledges receivable ► Less: allowance for doubtful accounts ▶ 5 Grants receivable 6 Receivables due from officers, directors, trustees, and other disqualified persons 7 Other notes and loans receivable Less: allowance for doubtful accounts I 8 Inventories for sale or use 9 Prepaid expenses and deferred charges 10a Investments - U.S. and state government obligations b Investments - corporate stock c Investments - corporate bonds 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 14,074 13,985 13,985. instructions. Also, see page 1, item 1) 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 22 Other liabilities (describe 0. 23 Total liabilities (add lines 17 through 22) Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31 **Fund Balances** 24 Unrestricted 25 Temporarily restricted 26 Permanently restricted ightharpoonsFoundations that do not follow SFAS 117, check here and complete lines 27 through 31 þ 27 Capital stock, trust principal, or current funds 0. 28 Paid-in or capital surplus, or land, bldg., and equipment fund 0. 14,074. 13,985. 29 Retained earnings, accumulated income, endowment, or other funds 14,074. 13,985. 30 Total net assets or fund balances 14,074. 13,985 31 Total liabilities and net assets/fund balances 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) 14,074. 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) 3 4 Add lines 1, 2, and 3 4 5 Decreases not included in line 2 (itemize) 5 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 Form 990-PF (2013)

F	Part IV Capital Gains ar	nd Losses for Tax on I	Investment	t Income					
		e the kınd(s) of property sold (e. house; or common stock, 200 sl			(b)	low acquired - Purchase - Donation		e acquired day, yr.)	(d) Date sold (mo., day, yr.)
1a	l								
_b	NON	E			ļ				
_					ļ				
					-				
e		(f) Depresenting allowed	/=\ Co/	at or other book	١			Coup or Ilogo	<u> </u>
	(e) Gross sales price	(f) Depreciation allowed (or allowable)		st or other basis expense of sale				Gain or (loss us (f) minus i	
	1								
b									
_	3								
_d	ı								
_e				10.10.1.10.0					
_	Complete only for assets showing							(Col. (h) gaın t not less thaı	
_	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69		cess of col. (i) col. (j), if any				s (from col. (
_a							 		
_ <u>b</u>		 							
									· · · · · · · · · · · · · · · · · · ·
_ <u>-</u>									-
	· ·	∫ If gain, also ent	er in Part I. line	7	7				
2	Capital gain net income or (net capit		0- ın Part I, line	7) [2			
3	Net short-term capital gain or (loss)	as defined in sections 1222(5) a	and (6):						
	If gain, also enter in Part I, line 8, co	olumn (c)			}	_			
	If (loss), enter -0- in Part I, line 8 Part V Qualification Un	der Section 4940(e) fo	r Reduced	l Tay on Not	: Ipy	3 estment In	nome		
_	or optional use by domestic private for					-			
`		•	1 4340(a) lax on	i ilet ilivestilletit il	Come	·- <i>)</i>			
If s	section 4940(d)(2) applies, leave this	part blank							
W	as the foundation liable for the sectio	n 4942 tax on the distributable a	mount of any ye	ear in the base pe	rıod?				Yes X No
	"Yes," the foundation does not qualify								
1	Enter the appropriate amount in each	ch column for each year; see the	instructions be	fore making any e	entries			-	(4)
	Base period years	(b) Adjusted qualifying d	istrihiitions	Net value of no	(C) nochar	ritable-use assets	,	Distrib	(d) oution ratio
_	Calendar year (or tax year beginning 2012	In) Adjusted qualifying d	0.	Net value of the	monai	13,87		(cor (p) aiv	nded by col. (c))
_	2012		0.			13,87			.000000
_	2010		0.			14,04			.000000
_	2009		500.			14,34			.034860
_	2008		2,899.			14,66			.197682
	Total of line 1, column (d)						2		.232542
3	Average distribution ratio for the 5-	•	il on line 2 by 5,	or by the number	r of ye	ars			0.465.00
	the foundation has been in existenc	e if less than 5 years					3	 	.046508
4	Enter the net value of noncharitable	-use assets for 2013 from Part X	K, line 5				4	ļ <u>-</u>	13,802.
5	Multiply line 4 by line 3						5	ļ <u> </u>	642.
6	Enter 1% of net investment income	(1% of Part I, line 27b)					6		0.
7	Add lines 5 and 6						7	ļ	<u>642.</u>
8	Enter qualifying distributions from F	Part XII, line 4					8		0.
	If line 8 is equal to or greater than li See the Part VI instructions.	ne 7, check the box in Part VI, lir	ne 1b, and comp	olete that part usin	ng a 1°	% tax rate.			

	n 990-PF (2013) PLANNING COUNCIL INC		2491			Page 4
	art VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or	4948	- see ı	nstru	OITOL	ns)
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)	1				
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here 🕨 🔲 and enter 1%	1				<u>0.</u>
	of Part I, line 27b					
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		3				<u>0.</u>
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4				<u>0.</u>
5	Tax based on investment income Subtract line 4 from line 3. If zero or less, enter -0-	5				0.
6	Credits/Payments.					
а	2013 estimated tax payments and 2012 overpayment credited to 2013 6a 6a					
b	Exempt foreign organizations - tax withheld at source 6b	╛				
C	Tax paid with application for extension of time to file (Form 8868)					
d	I Backup withholding erroneously withheld					
7	Total credits and payments. Add lines 6a through 6d	7				0.
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				0.
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				
Pa	art 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 intervel	ne in			Yes	No
	any political campaign?			1a		X
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition	n)?		1b		_X_
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials publis	hed or				
	distributed by the foundation in connection with the activities					
C	Did the foundation file Form 1120-POL for this year?			1c		Х
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	•				
е	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?			2		Х
	If "Yes," attach a detailed description of the activities					
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			3		X
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?			4a		X
	olf "Yes," has it filed a tax return on Form 990-T for this year?	N	/A	4b		
	Was there a liquidation, termination, dissolution, or substantial contraction during the year?			5		Х
	If "Yes," attach the statement required by General Instruction T					
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 of the state	ite law				
	remain in the governing instrument?			6	х	
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 X	(V		7	Х	
	, , , , , , , , , , , , , , , , , , ,				T	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions)					
	TX					
b	of 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			8b	х	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for call	llendar			<u> </u>	<u> </u>
٠	year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? If "Yes," complete Part XIV			9		X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses			10	1	X
	Territoria de la companya del companya de la companya de la companya del companya de la companya					<u></u>

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Pa	art 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		L x			
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privilege	s?					
	If "Yes," attach statement (see instructions)	12	2	X			
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X				
	Website address ► N/A		1 -				
14	The books are in care of ► BARRY PLAXCO, CPA Telephone no. ► (9	40)723	-14	71			
		▶7630					
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here	<u> </u>	·i	▶			
and enter the amount of tax-exempt interest received or accrued during the year							
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank,		N/A Yes	s No			
	securities, or other financial account in a foreign country?	16	l l	X			
	See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign			+			
	country						
Pa	art 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	s No			
12	During the year did the foundation (either directly or indirectly).		1.00	110			
10	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	7 No.					
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)	ן אוי					
	a disqualified person?	7 No.					
	(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? Yes X						
		ן אור					
	(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 X	7 No					
	(6) Agree to pay money or property to a government official? (Exception Check "No"	ן טאַ נ					
	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 X	7 No.					
		ן סאר					
0	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations	/3 4					
		/A 1b	'	+			
	Organizations relying on a current notice regarding disaster assistance check here	Ч					
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?	10	+	<u> </u>			
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)):			1			
а	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	ا ۱					
	before 2013? Ves X	ן מאר					
	If "Yes," list the years \(\bigs\), , , , , , , , , , , , , , , , , , ,						
Q	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	/3					
		/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.						
_	<u> </u>						
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time	٦					
	during the year?	1 No					
b	of "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,		-				
		/A 3b	<u> </u>	 			
	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	Ц	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?	46)	_ X_			

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued) 5a During the year did the foundation pay or incur any amount to: (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? (2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? (3) Provide a grant to an individual for travel, study, or other similar purposes? (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)? (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? (6) If any answer is Yes' to 5a(1)-(5), did any of the transactions fall to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance check here (7) Organizations relying on a current notice regarding disaster assistance check here (8) If wes, "attach the statement required by Regulations section 53.4945-5(d) (8) Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? (8) Did the foundation, during the year, pay premiums, directly or indirectly, to pay premiums on a personal benefit contract? (9) Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? (1) Tile, so the foundation managers and their compensation. (1) Tile, and average hours per week devoted four paid, enter -0-). (2) Compensation (1) (1)	NORTH TEXAS ESTATE AND F	'INANCIAL		T F 0404		_
5a During the year did the foundation pay or mour any amount to: (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? (2) Influence the outcome of any specific public electron (see section 4955), or to carry on, directly or indirectly, any voter registration drive? (3) Provide a grant to an individual for travel, study, or other similar purposes? (4) Provide a grant to an organization other than a charitable, etc., organization described in section 508(a)(1), (2), or (3), or section 4980(d)(2)? (5) Provide for any purpose either than religious, charitable, scientific, literary, or educational purposes, or for the provention of cruelty to children or animals? If any answer is "ves" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? N/A Yes No 10 The Yes	orm 990-PF (2013) PLANNING COUNCIL INC Part VII-B Statements Regarding Activities for Which I	Form 4720 May Re F	Required (contin	75-24914	16 T	Page 6
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? (2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter regislation driver; egislation driver, eg		Offit 4720 Way De I	nequired (contin	uea)		
(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? (3) Provide a grant to an individual for travel, study, or other similar purposes? (4) Provide a grant to an individual for travel, study, or other similar purposes? (5) Provide for any purpose other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelity to children or animals? If any answer is Yes 150 (a), 61, old any of the transactions fail to quality under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)? N/A Yes Into Into Into Into Into Into Into Into		n AQA5(a\\2		No. V No.		
any voter registration drive? (3) Provide a grant to an individual for travel, study, or other similar purposes? (4) Provide a grant to an organization other than a charitable, etc., organization described in section \$508(a)(1), (2), or (3), or section 494(d)(2)(2)? (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? b) If any answer is "Yes" to \$a(1)-(5), did any of the transactions fail to quality under the exceptions described in Regulations section \$5.4945 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance can be expenditure responsibility for this grant? Organizations relying on a current notice regarding disaster assistance check here of if the answer is "Yes" to question \$5.494.5 or its autemation of grants and the grant? If "Yes," attach the statement required by Regulations section \$5.3.4945-5(c) a personal benefit contract? Fig. 1 and a personal benefit contract? Fig. 2 and a personal benefit contract? Fig. 3 and any time during the year, pay premiums, directly or indirectly, to pay premiums on a personal benefit contract? Fig. 2 and any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? Fig. 3 and any time during the tax year, was the foundation aparty to a prohibited tax shelter transaction? Fig. 4 any time during the tax year, was the foundation aparty to a prohibited tax shelter transaction? Fig. 5 and the foundation receive any proceeds or have any net income attributable to the transaction? Fig. 5 and the foundation during the tax year, was the foundation managers and their compensation. (a) Name and address of each employees (other than those included on line 1). If none, enter "NONE." Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE." Compensation of five highest-paid emplo	•			5 L21 NU		
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Total number of other employees paid over \$50,000

Form 990-PF (2013) PLANNING COUNCIL INC		2491461 Page 7
Part VIII Information About Officers, Directors, Trustees, Founda Paid Employees, and Contractors (continued)	tion Managers, Highly	
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 Part IX-A Summary of Direct Charitable Activities		▶ 0
List the foundation's four largest direct charitable activities during the tax year. Include relevant statist number of organizations and other beneficiaries served, conferences convened, research papers proc	lical information such as the luced, etc.	Expenses
1		
SEE STATEMENT 4		0.
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.
Tutal. Add lines 1 tillough 3		0.

0 . Form **990-PF** (2013)

Page 8

<u>P</u>	Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations	ndations, see	instructions)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
а	Average monthly fair market value of securities	1a	0.
b	Average of monthly cash balances	1b	14,012.
C	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	14,012.
е	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	14,012.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	210.
5	Net value of noncharitable-use assets Subtract line 4 from line 3. Enter here and on Part V, line 4	5	13,802.
6	Minimum investment return. Enter 5% of line 5	6	690.
P	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations a foreign organizations check here and do not complete this part.)	nd certain	
1	Mınımum investment return from Part X, line 6	1	690.
2a	Tax on investment income for 2013 from Part VI, line 5		
b	Income tax for 2013. (This does not include the tax from Part VI.)]	
C	Add lines 2a and 2b	2c	0.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	690.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	690.
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	690.
P	Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
а	Expenses, contributions, gifts, etc total from Part I, column (d), line 26	1a	0.
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:		
а	Suitability test (prior IRS approval required)	3a	
þ	Cash distribution test (attach the required schedule)	3Ь	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	0.
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	0.
	Note The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation 4940(e) reduction of tax in those years.	qualifies for the	section

Form **990-PF** (2013)

PLANNING COUNCIL INC

Part XIII Undistributed Income (see instructions) (a) (b) (c) (d) Years prior to 2012 2012 2013 Corpus 1 Distributable amount for 2013 from Part XI, 690. line 7 2 Undistributed income, if any, as of the end of 2013 0 a Enter amount for 2012 only b Total for prior years: 0 3 Excess distributions carryover, if any, to 2013: 2,229. a From 2008 **b** From 2009 c From 2010 d From 2011 e From 2012 2,229 f Total of lines 3a through e 4 Qualifying distributions for 2013 from Part XII, line 4: ► \$_ 0 a Applied to 2012, but not more than line 2a **b** Applied to undistributed income of prior 0. years (Election required - see instructions) c Treated as distributions out of corpus 0. (Election required - see instructions) 0. d Applied to 2013 distributable amount 0. e Remaining amount distributed out of corpus 690. 690. 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: 1,539 a Corpus Add lines 3f, 4c, and 4e Subtract line 5 b Prior years' undistributed income. Subtract 0 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 0 assessed d Subtract line 6c from line 6b. Taxable 0. amount - see instructions 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 0. be distributed in 2014 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by 0 . section 170(b)(1)(F) or 4942(g)(3) 8 Excess distributions carryover from 2008 1,539 not applied on line 5 or line 7 9 Excess distributions carryover to 2014. 0 Subtract lines 7 and 8 from line 6a 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

Form 990-PF (2013) PLANNI	75-24	191461 Page 1			
Part XIV Private Operating F	oundations (see in	structions and Part VII	I-A, question 9)	N/A	
1 a If the foundation has received a ruling o	r determination letter that	t it is a private operating			
foundation, and the ruling is effective fo	r 2013, enter the date of t	the ruling	▶ L		
b Check box to indicate whether the found	dation is a private operatii	ng foundation described i	in section	4942(j)(3) or 4942(j)(3)	942(j)(5)
2 a Enter the lesser of the adjusted net	Tax year		Prior 3 years		
income from Part I or the minimum	(a) 2013	(b) 2012	(c) 2011	(d) 2010	(e) Total
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 Info	rmation (Comple	te this part only	if the founda	ation had \$5,000 or m	ore in assets
at any time during t	he year-see insti	ructions.)			
1 Information Regarding Foundation	n Managers:				
a List any managers of the foundation wh			ributions received	by the foundation before the clo	se of any tax
year (but only if they have contributed n	nore than \$5,000). (See s	ection 507(d)(2).)			
NONE					
b List any managers of the foundation wh			or an equally large	e portion of the ownership of a p	artnership or
other entity) of which the foundation ha	s a 10% or greater interes	st.			
NONE					
2 Information Regarding Contribute					
Check here 🕨 🗶 if the foundation of					
the foundation makes gifts, grants, etc.	(see instructions) to indiv	viduals or organizations u	nder other condition	ons, complete items 2a, b, c, an	d d.
a The name, address, and telephone num	ber or e-mail address of t	he person to whom appli	cations should be	addressed:	
N/A					
					
b The form in which applications should b	e submitted and informa	tion and materials they st	nould include:		
N/A			-		
c Any submission deadlines:					
N/A	o ouch as his passes to a	al arosa, chamicalis fields	lundo of metallit :	no or other feeters:	
d Any restrictions or limitations on awards	s, such as by geographic	ai areas, charitable fields,	KINGS OF INSTITUTION	is, or other factors:	
N/A					

323601 10-10-13

Form **990-PF** (2013)

NORTH TEXAS ESTATE AND FINANCIAL 75-2491461 Form 990-PF (2013) PLANNING COUNCIL INC Page 11 Part XV Supplementary Information (continued) 3 Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, show any relationship to any foundation manager or substantial contributor Recipient Foundation status of recipient Purpose of grant or contribution Amount Name and address (home or business) a Paid during the year NONE **▶** 3a Total b Approved for future payment NONE

Form **990-PF** (2013)

▶ 3b

Total

Form 990-PF (2013) PLANNING COUN	CIL INC			75-	2491461 Page 12
Part XVI-A Analysis of Income-Produ	cing Activit	ties		·	
Enter gross amounts unless otherwise indicated.	Unrelate	d business income	Exclu	ded by section 512, 513, or 514	(e)
Emol gross amounts amoss state was moleculed.	(a)	(b)	(C) Exclu-	(d)	Related or exempt
1 Program service revenue.	Business code	Amount	sion	Amount	function income
	code		0000		
a	-		 		
b	-		 		
c	-				
d	~		<u> </u>		
e	-		-		
f	-		ļ. <u>. </u>		
g Fees and contracts from government agencies			ļ		_
2 Membership dues and assessments			ļ		
3 Interest on savings and temporary cash					
investments			14	1.	
4 Dividends and interest from securities					
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property		•			
6 Net rental income or (loss) from personal					
property					
7 Other investment income		•			
8 Gain or (loss) from sales of assets other					
than inventory					
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory	-		+		
11 Other revenue:					
a	1 1				
b	-				
C	-				
d	-		-		
e	-				
12 Subtotal. Add columns (b), (d), and (e)		0.		1.	0.
13 Total Add line 12, columns (b), (d), and (e)				13	1.
(See worksheet in line 13 instructions to verify calculations.)					
Part XVI-B Relationship of Activities	to the Acco	mplishment of Ex	kemp	t Purposes	
Line No Explain below how each activity for which inc	ome is renorted i	n column (e) of Part XVI-A	A contrib	outed importantly to the accom	
the foundation's exempt purposes (other than					
2 ANNUAL MEMBERSHIP FEES			RY	THE EDUCATION	AL/CHARTTABLE
ORGANIZATION FROM PROF					
FINANCIAL PLANNING PRO					
EDUCATIONAL PROGRAMS,					
PLANNING OPPORTUNITIES					
ENHANCE THE SERVICES T					ERSHIP FEES
WERE COLLECTED DURING					EVALUATES
ITS PROGRAMMING DIRECT	TON AND	EFFURTS FUR	TH	E FUTUKE.	
					<u> </u>
					
				 	
l .					

Form 990		013) PLAN	NING COU	NCIL IN	IC		75-	<u> 2491461</u>	Page 13
Part 3	KVII			nsfers To a	and Transactions a	and Relations	hips With No	ncharitable	
		Exempt Organ	izations						
1 Did	the org	anization directly or indir	rectly engage in any	of the following	ng with any other organization	on described in secti	on 501(c) of		Yes No
the	Code (other than section 501(c))(3) organizations)	or in section 52	27, relating to political organ	nizations?			
a Tra	nsfers t	rom the reporting founda	ation to a noncharit	able exempt or	ganization of:				
(1)	Cash							1a(1)	X
(2)	Other	assets						1a(2)	X
		sactions:							
(1)	Sales	of assets to a noncharital	ble exempt organiza	ation				1b(1)	X_
		ases of assets from a noi	, -					1b(2)	X
	_	of facilities, equipment,	•	3				1b(3)	X
		ursement arrangements						1b(4)	X
		or loan guarantees						1b(5)	X
		mance of services or me	mhershin or fundra	usina salicitatio	nns			1b(6)	X
• • •		facilities, equipment, ma	•	•				1c	$\frac{x}{x}$
	-		•		edule. Column (b) should alv	wave chow the fair m	narket value of the o		
					ed less than fair market valu				· 13,
		the value of the goods,			ou 1033 thair fair market valt	oc in any transaction	or Straining arrange	mont, snow in	
(a) Line n		(b) Amount involved			e exempt organization	(d) Description	of transfers, transaction	and sharing ar	angements
(a) Line in	'	J ranount involved	(o) Name o	N/A	o exempt organization	(b) Description	or transfers, transaction	ns, and snaring an	angements
	+-			N/A					
						-			
	+							· · · · · · · · · · · · · · · · · · ·	
	+		·· ··			_			
-									
	+-					-			
-									
	_								
	_								
	-						·····		
									
	4								
2a Ist	he foun	dation directly or indirect	tly affiliated with, or	related to, one	or more tax-exempt organi	zations described			
ın s	ection	501(c) of the Code (other	r than section 501(c	c)(3)) or in sect	tion 527?			Yes	X No
b If"	es," co	mplete the following sche	edule.						
		(a) Name of org	anization		(b) Type of organization		(c) Description of re	lationship	
		N/A							
							-		
-					ng accompanying schedules and			May the IRS d	legues this
Sign	and be	lief, it is true, correct, and con	nplete Declaration of p	reparer (other tha	n taxpayer) is based on all inform	nation of which preparer	has any knowledge	return with the	preparer
Here		Bang Pe	oxer		10/15/14	Treas	urer	X Yes	No
	Sign	ature of office or trustee			Date	Title			
	اليسا	Print/Type preparer's na	ame	Preparer's s		Date	Check If	PTIN	
		· · · · · · · · · · · · · · · · · · ·			, D		self- employed	ı	
Paid		BARRY PLAX	CO. CPA	1 Ban	Places CPA	10/15/14		P00441	432
Prepa	arer	Firm's name ► MWH		P.C.		· ('(Firm's EIN ▶ 7		
Use (Thin Shains P 14VII	GROOF, I				I IIII S CIN P	J 440J4.	<u>u</u> J
		Firm's address ▶ P.	O. BOX 9'	7000					

WICHITA FALLS, TX 76307-7000

FORM 990-PF INTERES	T ON SAVING	S AND TEM	IPORARY	CASH I	INVESTMENTS	STATEMENT	1
SOURCE		(A REVE PER B	NUE		(B) INVESTMENT INCOME	(C) ADJUSTED NET INCOM	
WELLS FARGO			1.		1.		1.
TOTAL TO PART I, LIN	Е 3		1.		1.		1.
FORM 990-PF		OTHER E	XPENSE	S		STATEMENT	2
DESCRIPTION		(A) XPENSES ER BOOKS	NET I	B) NVEST- INCOME	(C) ADJUSTED NET INCOM		
BANK CHARGE FILING FEE		85. 5.		0 .		0.	0.
TO FORM 990-PF, PG 1	. LN 23	90.	-	0.	•	0.	0.

	PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS					
NAME AND ADDRESS	TITLE AND AVRG HRS/WK		EMPLOYEE BEN PLAN CONTRIB			
MIKE B MUIRHEAD 807 8TH ST #300 WICHITA FALLS, TX 76301	VICE PRESIDENT 0.05	0.	0.	0.		
RENEE BROWNING 807 8TH ST, 2ND FLOOR WICHITA FALLS, TX 76301	SECRETARY 0.05	0.	0.	0.		
BARRY PLAXCO PO BOX 97000 WICHITA FALLS, TX 76307	TREASURER 0.25	0.	0.	0.		
KELLY SMITH 2732 MIDWESTERN PKWY WICHITA FALLS, TX 76308	DIRECTOR 0.05	0.	0.	0.		
DONNIE SHIERRY PO BOX 4866 WICHITA FALLS, TX 76308	DIRECTOR 0.05	0.	0.	0.		
JERRY MCGEE 4301 MAPLEWOOD AVE, STE B WICHITA FALLS, TX 76308	DIRECTOR 0.05	0.	0.	0.		
DAVID WELCH 2304 MIDWESTERN PKWY #201 WICHITA FALLS, TX 76308	DIRECTOR 0.05	0.	0.	0.		
R TODD DAVENPORT 3711 MAPLEWOOD AVE, STE 200 WICHITA FALLS, TX 76308	DIRECTOR 0.05	0.	0.	0.		
TOTALS INCLUDED ON 990-PF, PAGE	6, PART VIII	0.	0.	0.		

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

0.

FORM 000 PE	CIRCULAR OF DEPENDING CHARLES ACCESSED TO		
FORM 990-PF	SUMMARY OF DIRECT CHARITABLE ACTIVITIES	STATEMENT	
ACTIVITY ONE			
SEMINARS AND PROCURRENT YEAR FRO	TTE AND FINANCIAL PLANNING EDUCATIONAL OGRAMS. THE BOARD WAS ON LEAVE DURING THE DM SCHEDULING PROGRAMS AND IS REEVALUATING I'S DIRECTION AND PROGRAM OFFERINGS FOR THE		
		EXPENSES	