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Form 990-PF

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](http://www.irs.gov/form990pf).

OMB No 1545-0052

2013

Open to Public Inspection

Department of the Treasury  
Internal Revenue Service

For calendar year 2013, or tax year beginning 07-01-2013 , and ending 06-30-2014

Name of foundation DonnaDale Freedom Foundation Inc		A Employer identification number 59-3581507	
Number and street (or P O box number if mail is not delivered to street address) 31 Fairway Circle		B Telephone number (see instructions) (386) 427-8130	
City or town, state or province, country, and ZIP or foreign postal code New Smyrna Beach, FL 32168		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"/> \$ 0		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 checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)			

Part I Analysis of Revenue and Expenses <small>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions) )</small>		(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 <b>not</b> required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities. . . . .	64,925	64,925	64,925	
	5a Gross rents . . . . .				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	-75,705			
	b Gross sales price for all assets on line 6a 177,925				
	7 Capital gain net income (from Part IV , line 2) . . . .				
	8 Net short-term capital gain . . . . .			5,100	
	9 Income modifications . . . . .				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold . . . . .				
	c Gross profit or (loss) (attach schedule) . . . . .				
	11 Other income (attach schedule) . . . . .				
	12 <b>Total.</b> Add lines 1 through 11 . . . . .	-10,780	64,925	70,025	
	13 Compensation of officers, directors, trustees, etc	14,000			
	14 Other employee salaries and wages . . . . .				
	15 Pension plans, employee benefits . . . . .				
	16a Legal fees (attach schedule) . . . . .				
	b Accounting fees (attach schedule) . . . . .	2,800	2,800		
	c Other professional fees (attach schedule) . . . . .				
	17 Interest . . . . .				
	18 Taxes (attach schedule) (see instructions)				
	19 Depreciation (attach schedule) and depletion . . . .				
	20 Occupancy . . . . .				
	21 Travel, conferences, and meetings . . . . .				
	22 Printing and publications . . . . .				
	23 Other expenses (attach schedule) . . . . .				
	24 <b>Total operating and administrative expenses.</b> Add lines 13 through 23 . . . . .	16,800	2,800		0
	25 Contributions, gifts, grants paid . . . . .	119,500			119,500
	26 <b>Total expenses and disbursements.</b> Add lines 24 and 25	136,300	2,800		119,500
	27 Subtract line 26 from line 12				
	a <b>Excess of revenue over expenses and disbursements</b>	-147,080			
	b <b>Net investment income</b> (if negative, enter -0-)		62,125		
	c <b>Adjusted net income</b> (if negative, enter -0-)			70,025	

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 . . . . .	11,033	11,366	
	2	Savings and temporary cash investments . . . . .	4,549	3,944	
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable . . . . .			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . .			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use . . . . .			
	9	Prepaid expenses and deferred charges . . . . .			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule) . . . . .	486,775	456,865	
	c	Investments—corporate bonds (attach schedule). . . . .	385,158	343,425	
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans . . . . .			
	13	Investments—other (attach schedule) . . . . .	506,067	430,224	
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	15	Other assets (describe ▶ _____)			
	16	<b>Total assets</b> (to be completed by all filers—see the instructions Also, see page 1, item I)	1,393,582	1,245,824	0
Liabilities	17	Accounts payable and accrued expenses . . . . .	678	1,257	
	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	<b>Total liabilities</b> (add lines 17 through 22) . . . . .	678	1,257	
Net Assets or Fund Balances		<b>Foundations that follow SFAS 117, check here</b> ▶ <input checked="" type="checkbox"/> <b>and complete lines 24 through 26 and lines 30 and 31.</b>			
	24	Unrestricted . . . . .	1,392,904	1,244,567	
	25	Temporarily restricted . . . . .			
	26	Permanently restricted . . . . .			
		<b>Foundations that do not follow SFAS 117, check here</b> ▶ <input type="checkbox"/> <b>and complete lines 27 through 31.</b>			
	27	Capital stock, trust principal, or current funds . . . . .			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	<b>Total net assets or fund balances</b> (see page 17 of the instructions) . . . . .	1,392,904	1,244,567	
	31	<b>Total liabilities and net assets/fund balances</b> (see page 17 of the instructions) . . . . .	1,393,582	1,245,824	

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	1,392,904
2	Enter amount from Part I, line 27a . . . . .	2	-147,080
3	Other increases not included in line 2 (itemize) ▶ _____	3	
4	Add lines 1, 2, and 3 . . . . .	4	1,245,824
5	Decreases not included in line 2 (itemize) ▶ _____	5	1,257
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 . . . . .	6	1,244,567

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				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a				
b				
c				
d				
e				
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				
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	-75,705
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	5,100

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	118,337	1,310,106	0 09033
2011	111,815	1,239,537	0 09021
2010	108,000	1,300,191	0 08307
2009	112,892	1,207,845	0 09347
2008	97,649	939,866	0 10390
2 Total of line 1, column (d). . . . .			2 0 46096
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 09219
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5. . . . .			4 1,329,003
5 Multiply line 4 by line 3. . . . .			5 122,523
6 Enter 1% of net investment income (1% of Part I, line 27b). . . . .			6 621
7 Add lines 5 and 6. . . . .			7 123,144
8 Enter qualifying distributions from Part XII, line 4. . . . .			8 119,500

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

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)					
1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1		1	1,243		
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 . . . . .		2			
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)					
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)				2	
3 Add lines 1 and 2. . . . .				3	1,243
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4			
5 Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0- . . . . .		5	1,243		
6 Credits/Payments		7			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a				
b Exempt foreign organizations—tax withheld at source . . . . .	6b				
c Tax paid with application for extension of time to file (Form 8868)	6c				
d Backup withholding erroneously withheld . . . . .	6d				
7 Total credits and payments Add lines 6a through 6d. . . . .		7			
8 Enter any penalty for underpayment of estimated tax Check here <input checked="" type="checkbox"/> if Form 2220 is attached		8	15		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed . . . . .		9	1,258		
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 <input type="checkbox"/> Refunded <input type="checkbox"/>		11			

Part VII-A Statements Regarding Activities			
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? . . . . .		1a	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? . . . . .		1b	No
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.			
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? . . . . .		2	No
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	No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?. . . . .		4a	No
b If "Yes," has it filed a tax return on Form 990-T for this year?. . . . .		4b	No
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? . . . . .		5	No
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		6	Yes
• 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? . . . . .		7	Yes
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.			
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> _____			
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 .		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)? If "Yes," complete Part XIV . . . . .		9	No
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses.		10	No

Part VII-A

Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address N/A				
14	The books are in care of Robert L Svoboda Telephone no (386) 427-8130 Located at 31 Fairway Circle New Smyrna Beach FL ZIP+4 32168			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here and enter the amount of tax-exempt interest received or accrued during the year.	15		
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	Yes	No
See instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes", enter the name of the foreign country				

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

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

Part VII-B

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

5a

During the year did the foundation pay or incur any amount to

(1)

Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

YesNo

(2)

Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

YesNo

(3)

Provide a grant to an individual for travel, study, or other similar purposes?

YesNo

(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).

YesNo

(5)

Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

YesNo

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?

YesNo

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?

YesNo

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?

YesNo

b

If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

7b

No

Part VIII

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

1

List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Additional Data Table				

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.

Form 990-PF (2013)

Part VIII

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

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

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

Part IX-A

Summary of Direct Charitable Activities

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

Part IX-B

Summary of Program-Related Investments (see instructions)

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

Part X

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities. . . . .	1a	1,339,232
b	Average of monthly cash balances. . . . .	1b	10,010
c	Fair market value of all other assets (see instructions). . . . .	1c	0
d	Total (add lines 1a, b, and c). . . . .	1d	1,349,242
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation). . . . .	1e	0
2	Acquisition indebtedness applicable to line 1 assets. . . . .	2	
3	Subtract line 2 from line 1d. . . . .	3	1,349,242
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions). . . . .	4	20,239
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	1,329,003
6	Minimum investment return. Enter 5% of line 5. . . . .	6	66,450

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	66,450
2a	Tax on investment income for 2013 from Part VI, line 5. . . . .	2a	1,243
b	Income tax for 2013 (This does not include the tax from Part VI ). . . . .	2b	
c	Add lines 2a and 2b. . . . .	2c	1,243
3	Distributable amount before adjustments Subtract line 2c from line 1. . . . .	3	65,207
4	Recoveries of amounts treated as qualifying distributions. . . . .	4	
5	Add lines 3 and 4. . . . .	5	65,207
6	Deduction from distributable amount (see instructions). . . . .	6	
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1. . . . .	7	65,207

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	119,500
b	Program-related investments—total from Part IX-B. . . . .	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes. . . . .	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required). . . . .	3a	
b	Cash distribution test (attach the required schedule). . . . .	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	119,500
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions). . . . .	5	
6	Adjusted qualifying distributions. Subtract line 5 from line 4. . . . .	6	119,500
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				65,207
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only. . . . .				
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2013				
a From 2008. . . . .	52,052			
b From 2009. . . . .	53,716			
c From 2010. . . . .	44,340			
d From 2011. . . . .	51,208			
e From 2012. . . . .	54,158			
f Total of lines 3a through e. . . . .	255,474			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 119,500				
a Applied to 2012, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions). . . . .				
c Treated as distributions out of corpus (Election required—see instructions). . . . .	0			
d Applied to 2013 distributable amount. . . . .				65,207
e Remaining amount distributed out of corpus	54,293			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	309,767			
b Prior years' undistributed income Subtract line 4b from line 2b. . . . .				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed. . . . .				
d Subtract line 6c from line 6b Taxable amount—see instructions . . . . .				
e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount—see instructions . . . . .				
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014 . . . . .				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions). . . . .				
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions). . .	52,052			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a . . . . .	257,715			
10 Analysis of line 9				
a Excess from 2009. . . .	53,716			
b Excess from 2010. . . .	44,340			
c Excess from 2011. . . .	51,208			
d Excess from 2012. . . .	54,158			
e Excess from 2013. . . .	54,293			

Part XIV

Private 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 XV

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

1

Information Regarding Foundation Managers:

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 or e-mail address of the person to whom applications should be addressed

DonnaDale Freedom Foundation Inc  
31 Fairway Circle  
New Smyrna Beach,FL 32168  
(386) 427-8130

b

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

No specific format required

c

Any submission deadlines

No deadlines

d



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

No restrictions

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)				
<b>a</b> <i>Paid during the year</i>				
Sacred Heart Catholic School 1003 Turnbull Street New Smyrna Beach, FL 32168	None	N/A	Tuition assistance grants	91,000
Father Lopez Catholic High School 3918 LPGA Blvd Daytona Beach, FL 32124	None	N/A	Tuition assistance grants	25,000
Little Sisters of the Poor 4291 Richmond Road Cleveland, OH 44122	None	N/A	Contribution	3,000
Redemptorist Fathers 998 Father Donlon Drive New Smyrna Beach, FL 32168	None	N/A	Cash donation	500
<b>Total</b> . . . . .			 <b>3a</b>	119,500
<b>b</b> <i>Approved for future payment</i>				
<b>Total</b> . . . . .			 <b>3b</b>	

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 VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation**

<b>(a)</b> Name and address	<b>(b)</b> Title, and average hours per week devoted to position	<b>(c)</b> Compensation <b>(If not paid, enter -0-)</b>	<b>(d)</b> Contributions to employee benefit plans and deferred compensation	<b>(e)</b> Expense account, other allowances
Robert L Svoboda 31 Fairway Circle New Smyrna Beach, FL 32168	President 20 00	12,000		
Catherine M Svoboda 6012 39th Avenue Hyattsville, MD 20702	Secretary 1 00	0		
Judith A Alessandri 42504 Lake Sucess Drive Northville, MI 48167	Vice President 1 00	1,000		
Robert L Svoboda Jr 329 Moross Gross Pointe, MI 48236	Treasurer 1 00	1,000		
Therese Staub 17 Barclay Road Line Lexington, PA 18932	Director 0 00	0		
Carol Svoboda 1715 N Inglewood Arlington, VA 22205	Director 0 00	0		

**TY 2013 Accounting Fees Schedule****Name:** DonnaDale Freedom Foundation Inc**EIN:** 59-3581507**Software ID:** 13000170**Software Version:** 2013v3.1

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
BFDPA tax preparation fees	2,800	2,800	0	0

## TY 2013 Other Decreases Schedule

**Name:** DonnaDale Freedom Foundation Inc

**EIN:** 59-3581507

**Software ID:** 13000170

**Software Version:** 2013v3.1

Description	Amount
Current year excise tax accrual	1,257

<u>Date Acquired</u>	<u>Shares/ Quantity</u>	<u>Description</u>	<u>Cost Basis 6/30/2013</u>	<u>Cost Basis 6/30/2014</u>	<u>Market Value 6/30/2014</u>
<b>Cash - non-interest bearing</b>					
		Cash	976 10	830 53	830 53
		Morgan Stanley Bank, N A Deposits	10,056 89	10,535 52	10,535 52
		<b>Total cash and bank deposits</b>	<b>11,032.99</b>	<b>11,366.05</b>	<b>11,366.05</b>
<b>Investments - Corporate Stocks</b>					
<b>Common stocks</b>					
1/9/2014	311 000	American Airls Group Inc	-	5,985 70	13,360 56
2/10/2014	265 000	American Airls Group Inc	-	5,560 00	11,384 40
3/10/2014	275 000	American Airls Group Inc	-	7,010 06	11,814 00
3/10/2014	115 000	American Airls Group Inc	-	3,900 14	4,940 40
12/31/2007	375 000	AT&T Inc	15,954 89	15,954 89	13,260 00
11/10/2010	125 000	AT&T Inc	3,627 00	3,627 00	4,420 00
10/11/2007	500 000	Bristol Myers Squibb Co	15,170 97	15,170 97	24,255 00
7/8/2010	50 000	Chevron Corp	3,490 45	3,490 45	6,527 50
12/7/2010	50 000	Chevron Corp	4,297 00	4,297 00	6,527 50
6/24/2014	75 000	Chevron Corp	-	10,211 47	9,791 25
7/25/2007	500 000	Comcast Corp New Class A	14,559 61	14,559 61	26,840 00
2/21/2007	700 000	CubeSmart (formerly U-Store It Trust)	16,584 73	16,584 73	12,824 00
7/8/2010	275 000	Ford Motor Co New	2,914 73	2,914 73	4,741 00
12/31/2007	150 000	Garmin LTD Shs	15,022 00	15,022 00	9,135 00
3/19/2010	675 000	General Electric Co	12,174 91	-	-
6/22/2011	600 000	General Electric Co	15,881 17	11,549 94	15,768 00
1/23/2012	600 000	General Electric Co	11,657 35	11,657 35	15,768 00
2/21/2013	900 000	General Electric Co	21,384 59	21,384 59	23,652 00
7/28/2011	2 000	General Motors Co Warrants (WTS) 071016 (GM*A)	651 53	-	-
7/28/2011	7 000	General Motors Co Warrants (WTS) 071016 (GM*A)	2,280 60	-	-
10/28/2011	1 000	General Motors Co Warrants (WTS) 071016 (GM*A)	325 80	-	-
10/28/2011	5 000	General Motors Co Warrants (WTS) 071016 (GM*A)	1,629 00	-	-
7/28/2011	2 000	General Motors Co Warrants (WTS) 071019 (GM*B)	651 52	-	-
7/28/2011	7 000	General Motors Co Warrants (WTS) 071019 (GM*B)	2,280 60	-	-
10/28/2011	1 000	General Motors Co Warrants (WTS) 071019 (GM*B)	325 80	-	-
10/28/2011	5 000	General Motors Co Warrants (WTS) 071019 (GM*B)	1,629 00	-	-
12/23/2013	19 000	General Motors Co Warrants (WTS) 071016 (GM*A)	-	-	505 59
12/23/2013	19 000	General Motors Co Warrants (WTS) 071019 (GM*B)	-	-	352 64
7/29/2011	345 000	General Motors Co (GM)	31,288 05	-	-
7/29/2011	143 000	General Motors Co (GM)	12,968 67	-	-
10/28/2011	1 000	General Motors Co (GM)	90 69	-	-
10/28/2011	5 000	General Motors Co (GM)	452 40	-	-
12/23/2013	20 000	General Motors Co (GM)	-	-	726 00
7/14/2006	600 000	Hawaiian Electric Ind	17,052 94	17,052 94	15,192 00
12/1/2006	300 000	Home Depot Inc	16,228 95	12,171 71	24,288 00
12/7/2010	160 000	Johnson & Johnson	10,004 16	10,004 16	16,739 20
8/27/2007	358 000	Lloyds Banking Group PLC	15,963 93	-	-
10/8/2010	100 000	Lorillard, Inc	7,952 55	7,952 55	18,291 00
9/25/2007	500 000	Lowes Companies Inc	14,567 22	14,567 22	23,995 00
11/28/2007	500 000	Macy's Inc	15,328 25	15,328 25	29,010 00
12/7/2010	280 000	Merck & Co Inc New Com	9,922 39	9,922 39	16,198 00
6/24/2014	170 000	Merck & Co Inc New Com	-	10,181 27	9,834 50
1/12/2011	640 000	Micron Tech Inc	6,041 60	6,041 60	21,088 00
6/12/2012	99 000	Motors Liq Co Guc Tr UBI	-	-	2,534 40
1/12/2011	87 000	Murphy Oil Corp	5,569 24	5,569 24	5,783 76
1/12/2011	21 000	Murphy USA Inc Com	898 36	898 36	1,026 69
9/25/2007	350 000	Nordstrom Inc	17,274 42	17,274 42	23,775 50
12/7/2010	500 000	Pfizer Inc	10,090 80	8,409 00	14,840 00
6/24/2014	325 000	Pfizer Inc	-	9,828 81	9,646 00
4/29/2009	100 000	Philip Morris Intl Inc	3,727 80	3,727 80	8,431 00
1/23/2012	175 000	Proctor & Gamble	11,694 24	11,694 24	13,753 25
4/23/2007	350 000	Scana Corp New	16,013 65	16,013 65	18,833 50

DonnaDale Freedom Foundation, Inc  
**Investment Holdings**  
Year Ended June 30, 2014

TIN 59-3581507  
Form 990-PF- Part II  
Attachment

<u>Date Acquired</u>	<u>Shares/ Quantity</u>	<u>Description</u>	<u>Cost Basis 6/30/2013</u>	<u>Cost Basis 6/30/2014</u>	<u>Market Value 6/30/2014</u>
11/5/2010	300 000	Verizon Communications	9,950 34	9,950 34	14,679 00
6/24/2014	200 000	Verizon Communications	-	10,195 08	9,786 00
8/30/2006	325 000	Walgreen Co	16,300 98	16,300 98	24,092 25
<b>Preferred stocks</b>					
2/29/2008	1,000 000	Deutsche Bk Cont Cap T II	23,453 60	23,453 60	26,130 00
2/29/2008	1,000 000	ING Group NV 7 2% Ser	24,945 95	24,945 95	25,810 00
7/11/2002	1,000 000	Nat Westm Bk 7 760% ADS Ser C	26,500 78	26,500 78	26,270 00
<b>Total corporate stocks</b>			<b>486,775.21</b>	<b>456,864.97</b>	<b>616,619.89</b>
<b>Investments - Exchange-Traded &amp; Closed-End Funds</b>					
12/26/2006	1,750 000	Allianz NFJ Dividend Int & Pre Strgy	44,310 28	44,310 28	32,917 50
11/18/2008	2,000 000	Blackrock Core Bond Tr	19,180 00	19,180 00	27,920 00
4/30/2007	1,400 000	Blackrock Credit All Inc Tr IV	32,257 26	-	-
7/28/2009	413 000	Blackrock Global Opportunity Equity Tr	15,278 61	15,278 61	6,215 65
2/26/2007	1,000 000	Blackrock LTD Duration Inc	19,854 82	19,854 82	17,290 00
6/30/2005	1,000 000	Eaton Vance ENHNCD Eq Inc	18,552 05	18,552 05	13,460 00
5/31/2007	750 000	Eaton Vance Tax Mg CEF	14,206 09	14,206 09	8,775 00
6/5/2007	1,000 000	Eaton Vance Tax Mgd Div Equ Fd	18,650 75	18,650 75	10,370 00
6/30/2005	1,200 000	First Tr/Enhanced Equity Inc	22,189 97	22,189 97	17,352 00
12/26/2006	200 000	Guggenheim Enhanced Equity Str	22,950 55	22,950 55	3,840 00
4/30/2007	3,000 000	Nuveen Float Rate Incm Fund	40,950 82	40,950 82	36,300 00
9/27/2013	2,100 000	Nuveen Float Rate Incm Fund	-	25,373 82	25,410 00
10/18/2013	660 000	Tortoise MLP Fund Inc	-	18,726 49	19,747 20
<b>Total ETF &amp; CEF</b>			<b>268,381.20</b>	<b>280,224.25</b>	<b>219,597.35</b>
<b>Investments - Corporate Bonds and Fixed Rate Securities</b>					
<b>Corporate bonds</b>					
8/26/2004	25,000 000	Hertz Corp 6 9%	26,380 00	26,380 00	25,156 25
8/27/2007	11,000 000	RRI Energy Inc 7 875%	11,060 50	11,060 50	11,687 50
7/28/2003	10,000 000	Diamond State Telephone	11,005 00	-	-
2/28/2001	50,000 000	Ford Motor Co Debenture	50,566 50	50,566 50	62,809 00
7/28/2003	20,000 000	Safeway Inc Debentures	21,605 00	21,605 00	21,053 60
4/27/2004	25,000 000	Ford Motor Co 6 625%	23,630 00	23,630 00	30,941 25
7/21/2004	13,000 000	Ford Motor Co 6 375%	11,428 75	11,428 75	15,467 53
7/31/2008	50,000 000	Pulte Homes Inc	44,720 50	44,720 50	56,500 00
4/3/2014	25,500 000	Escrow Lehman Brothers Holdings	-	-	4,875 00
4/28/2008	7,000 000	Kohl Corporation 6 0%	5,820 55	5,820 55	7,830 48
12/22/2003	25,000 000	Verizon Maryland Vx	22,880 00	22,880 00	25,472 25
4/28/2008	30,000 000	Home Depot Inc 5 875%	25,864 97	25,864 97	37,109 40
3/19/2008	30,000 000	Penney JC Co Inc Debenture 7 40%	29,897 24	-	-
4/3/2014	15,000 000	Escrow Lehman Brothers Holdings	-	-	2,962 50
4/1/2008	15,000 000	Kohls Corp 6 875%	13,972 90	13,972 90	18,382 05
<b>Fixed Rate Securities</b>					
2/1/2010	600 000	Countrywide Capital V 7 00%	12,816 00	12,816 00	15,600 00
10/2/2007	1,000 000	AMR Corp Delaware Public Income 7 875%	22,455 90	-	-
6/22/2012	1,000 000	Qwest Corp 7%	25,906 50	25,906 50	25,910 00
11/2/2011	1,000 000	Goldman Sachs Group Inc	25,147 90	25,147 90	25,940 00
9/27/2013	1,000 000	Duke Energy Corp 5 125%	-	21,624 90	23,910 00
<b>Total corporate bonds and fixed rate securities</b>			<b>385,158.21</b>	<b>343,424.97</b>	<b>411,606.81</b>
<b>Investments - Mutual Funds</b>					
3/29/2007	35,336 130	Franklin Income A	100,000 00	100,000 00	91,167 22
5/30/2007	3,518 649	Goldman Sachs Gr & Inc Strat A	50,000 00	-	-
5/31/2007	1,961 554	Voya Global Real Estate A	50,000 00	50,000 00	39,937 24
5/30/2007	2,829 242	Pioneer Global High Yield A	37,685 59	-	-
<b>Total mutual funds</b>			<b>237,685.59</b>	<b>150,000.00</b>	<b>131,104.46</b>
<b>Total cash and investments, 6/30/2014</b>			<b>1,389,033.20</b>	<b>1,241,880.24</b>	<b>1,390,294.56</b>