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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

OMB No 1545-0052

2013

Open to Public Inspection

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.

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

Name of foundation LP AND TERESA ANDERSON FOUNDATION		A Employer identification number 81-0479060
Number and street (or P O box number if mail is not delivered to street address) PO BOX 190	Room/suite	B Telephone number (see instructions) (406) 232-3920
City or town, state or province, country, and ZIP or foreign postal code MILES CITY, MT 59301		C If exemption application is pending, check here ☐
G Check all that apply.	Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change ☐	D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
H Check type of organization ☐ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☒ Other taxable private foundation	J Accounting method. ☐ Cash ☒ Accrual ☐ Other (specify) _____	E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 517,777	(Part I, column (d) must be on cash basis.)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

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 ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	1	1		
	4 Dividends and interest from securities	14,036	14,036		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	1,463			
	b Gross sales price for all assets on line 6a	94,989			
	7 Capital gain net income (from Part IV, line 2)		1,463		
	8 Net short-term capital gain			465	
	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) STM106	1,380	1,380		
	12 Total. Add lines 1 through 11	16,880	16,880	465	
	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule) STM108	4,736	562	3,174	
	c Other professional fees (attach schedule) STM109	5,761	3,851	1,000	910
	17 Interest				
	18 Taxes (attach schedule) (see instructions) STM110	97	97		72
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy	1,339	339	331	669
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule) STM103	1,241	39	638	564
	24 Total operating and administrative expenses. Add lines 13 through 23	13,174	5,888	5,143	2,215
	25 Contributions, gifts, grants paid	26,100			18,258
	26 Total expenses and disbursements. Add lines 24 and 25	39,274	5,888	5,143	20,473
	27 Subtract line 26 from line 12	(22,394)			
	a Excess of revenue over expenses and disbursements		10,992		
	b Net investment income (if negative, enter -0-)				
	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		8,540	378	378
	2	Savings and temporary cash investments		112,166	105,815	105,815
	3	Accounts receivable ▶				
		Less: allowance for doubtful accounts ▶		551		
	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)	STM137	376,497	376,957	411,584
	c	Investments - corporate bonds (attach schedule)				
	11	Investments - land, buildings, and equipment basis ▶				
	Less accumulated depreciation (attach schedule) ▶					
12	Investments - mortgage loans					
13	Investments - other (attach schedule)					
14	Land, buildings, and equipment: basis ▶					
	Less accumulated depreciation (attach schedule) ▶					
15	Other assets (describe ▶)					
16	Total assets (to be completed by all filers - see the instructions Also, see page 1, item I)		497,754	483,150	517,777	
Liabilities	17	Accounts payable and accrued expenses		616	564	
	18	Grants payable		7,258	15,100	
	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)		7,874	15,664	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.					
	24	Unrestricted				
	25	Temporarily restricted				
	26	Permanently restricted				
	Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.					
	27	Capital stock, trust principal, or current funds		489,880		
	28	Paid-in or capital surplus, or land, bldg, and equipment fund				
	29	Retained earnings, accumulated income, endowment, or other funds			467,486	
	30	Total net assets or fund balances (see instructions)		489,880	467,486	
31	Total liabilities and net assets/fund balances (see instructions)		497,754	483,150		

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)	1 489,880
2	Enter amount from Part I, line 27a	2 (22,394)
3	Other increases not included in line 2 (itemize) ▶	3
4	Add lines 1, 2, and 3	4 467,486
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	6 467,486

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 (yr, mo, day)	(d) Date sold (yr, mo, day)
1a	SHORT TERM MUTUAL FUND ACTIVITY	P	2013-07-01	2014-06-30
b	LONG TERM MUTUAL FUND ACTIVITY	P	2013-06-30	2014-06-30
c	6184.974 SH HARTFORD FLOATING FUND	P	2011-10-31	2014-02-25
d	105 SH IBM	P	2013-01-04	2014-02-27
e	170 SH ISHARES TR BARCLAYS TIPS	P	2012-03-23	2014-02-27

	(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	465			465
b	213			213
c	55,970	53,504		109,474
d	19,387	19,970		39,357
e	18,954	20,052		39,006

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

	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a				465
b				213
c				109,474
d				39,357
e				39,006

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	1,463
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	465

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2012	33,689	519,493	0.06485
2011	25,872	554,850	0.046629
2010	26,968	433,328	0.062235
2009	23,067	424,380	0.054355
2008	9,736	404,708	0.024057

2	Total of line 1, column (d)	2	0.252125
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	0.050425
4	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	490,634
5	Multiply line 4 by line 3	5	24,740
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	110
7	Add lines 5 and 6	7	24,850
8	Enter qualifying distributions from Part XII, line 4	8	35,573

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 instructions)

1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		1	110
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	110
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	110
6 Credits/Payments			
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	500	
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7		500
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		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		390
11 Enter the amount of line 10 to be: Credited to 2014 estimated tax 150 Refunded	11		240

Part VII-A Statements Regarding Activities

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

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	
Website address ▶ N/A				
14	The books are in care of ▶ SANDRA K ANDERSON Telephone no. ▶ 406-232-3920			
Located at ▶ PO BOX 190, MILES CITY, MT ZIP+4 ▶ 59301				
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 the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ▶				X

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

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

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a During the year did the foundation pay or incur any amount to

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions) ☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)? ☐ Yes ☒ 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? ☐ Yes ☒ No

If "Yes," attach the statement required by Regulations section 53.4945-5(d)

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? ☐ Yes ☒ 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? ☐ Yes ☒ No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? ☐ Yes ☒ 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
SANDRA K ANDERSON PO BOX 190, MILES CITY, MT 59301	PRESIDENT 2	STMA01 0	0	0
JEFFREY A HUNNES PO BOX 1977, BILLINGS, MT 59101	SECRETARY 1	STMA02 0	0	0
JOHN A TOOKE PO BOX 1134, MILES CITY, MT 59301	TREASURER 1	STMA03 0	0	0

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
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 N/A	
2	0
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 N/A	
2	0
All other program-related investments See 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	494,117
b	Average of monthly cash balances	1b	2,706
c	Fair market value of all other assets (see instructions)	1c	0
d	Total (add lines 1a, b, and c)	1d	496,823
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	496,823
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	6,189
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	490,634
6	Minimum investment return. Enter 5% of line 5	6	24,532

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	24,532
2a	Tax on investment income for 2013 from Part VI, line 5	2a	110
b	Income tax for 2013 (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	110
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	24,422
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	24,422
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	24,422

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	20,473
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	15,100
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	35,573
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	110
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	35,463

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				24,422
2 Undistributed income, if any, as of the end of 2013:				
a Enter amount for 2012 only			25,903	
b Total for prior years <u>2004, 2006,</u>		2,900		
3 Excess distributions carryover, if any, to 2013.				
a From 2008				
b From 2009				
c From 2010				
d From 2011		2,542		
e From 2012		202		
f Total of lines 3a through e	2,744			
4 Qualifying distributions for 2013 from Part XII, line 4. ▶ \$ <u>35,573</u>				
a Applied to 2012, but not more than line 2a			25,903	
b Applied to undistributed income of prior years (Election required - see instructions)		53,868		
c Treated as distributions out of corpus (Election required - see instructions)				
d Applied to 2013 distributable amount				24,422
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2013	2,744			2,744
(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				
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				
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)	26,100			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions)				
9 Excess distributions carryover to 2014. 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		2,542		
d Excess from 2012		202		
e Excess from 2013		1,568		

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

	Tax year	Prior 3 years			(e) Total
	(a) 2013	(b) 2012	(c) 2011	(d) 2010	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test - enter:					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test - enter:					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 Information Regarding Foundation Managers:

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2).)

NONE,

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

NONE,

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

a The name, address, and telephone number or e-mail of the person to whom applications should be addressed

990APP

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 Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year SEE SUPPLEMENTARY INFORMATION VARIOUS MILES CITY, MT 59301	NONE		VARIOUS	11,000
Total			3a	11,000
b Approved for future payment SEE SUPPLEMENTARY INFORMATION VARIOUS MILES CITY, MT 59301	NONE		VARIOUS	15,100
Total			3b	15,100

Part XVI-A **Analysis of Income-Producing Activities**

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1	Program service revenue					
a	N/A					
b						
c						
d						
e						
f						
g	Fees and contracts from government agencies . . .					
2	Membership dues and assessments					
3	Interest on savings and temporary cash investments .					
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 _____					
b	_____					
c	_____					
d	_____					
e	_____					
12	Subtotal Add columns (b), (d), and (e)					
13	Total. Add line 12, columns (b), (d), and (e)					

(See worksheet in line 13 instructions to verify calculations)

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

[illegible]

- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** and check this box ☒ **Note.** Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** (on page 1).

Part II Additional (Not Automatic) 3-Month Extension of Time. Only file the original (no copies needed)

Enter filer's identifying number, see instructions

Type or print File by the due date for filing your return. See instructions	Name of exempt organization or other filer, see instructions LP AND TERESA ANDERSON FOUNDATION	Employer identification number (EIN) or 81-0479060
	Number, street, and room or suite no. If a P.O. box, see instructions PO BOX 190	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions MILES CITY, MT 59301	

Enter the Return code for the return that this application is for (file a separate application for each return) 0 4

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01		
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720 (other than individual)	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.

- The books are in the care of **SANDRA K ANDERSON, PO BOX 190, MILES CITY, MT 59301**
Telephone No **406-232-3920** FAX No
- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) If this is for the whole group, check this box ☐ If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for

- 4 I request an additional 3-month extension of time until **05-15**, 20**15**
- 5 For calendar year , or other tax year beginning **07-01**, 20**13** and ending **06-30**, 20**14**
- 6 If the tax year entered in line 5 is for less than 12 months, check reason ☐ Initial return ☐ Final return
☐ Change in accounting period

- 7 State in detail why you need the extension

An attempt to obtain information necessary for filing a return was requested in a timely fashion, but the information was not furnished in sufficient time to permit the timely filing of the return.

8a If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions	8a	\$	500
b If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868.	8b	\$	500
c Balance due. Subtract line 8b from line 8a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	8c	\$	0

Signature and Verification must be completed for Part II only.

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature **EEA** Title Date Form 8868 (Rev 1-2014)

Filed 2/16/15
Rec 2/16/15

Application for Extension of Time To File an
Exempt Organization Return

OMB No 1545-1709

▶ File a separate application for each return.

▶ Information about Form 8868 and its instructions is at www.irs.gov/form8868.

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form)

Do not complete **Part II** unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.

Electronic filing (e-file). You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to request an extension of time to file any of the forms listed in **Part I** or **Part II** with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit www.irs.gov/efile and click on e-file for Charities & Nonprofits.

Part I Automatic 3-Month Extension of Time. Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete

Part I only ☐

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns

Enter filer's identifying number, see instructions

Type or print File by the due date for filing your return. See instructions.	Name of exempt organization or other filer, see instructions. LP AND TERESA ANDERSON FOUNDATION	Employer identification number (EIN) or 81-0479060
	Number, street, and room or suite no. If a P.O. box, see instructions. PO BOX 190	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. MILES CITY, MT 59301	

Enter the Return code for the return that this application is for (file a separate application for each return)

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720 (other than individual)	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

- The books are in the care of ▶ **SANDRA K ANDERSON, PO BOX 190, MILES CITY, MT 59301**

Telephone No ▶ **406-232-3920**

FAX No. ▶

- If the organization does not have an office or place of business in the United States, check this box ☐

- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) If this is for the whole group, check this box ☐ If it is for part of the group, check this box ☐ and attach

a list with the names and EINs of all members the extension is for.

- I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until **02-17**, **2015**, to file the exempt organization return for the organization named above. The extension is for the organization's return for
 - ▶ ☐ calendar year 20__ or

- ▶ ☒ tax year beginning **07-01**, **2013**, and ending **06-30**, **2014**.

- If the tax year entered in line 1 is for less than 12 months, check reason: ☐ Initial return ☐ Final return ☐ Change in accounting period

3a If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	500
b If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$	0
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$	500

Caution. If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

For Privacy Act and Paperwork Reduction Act Notice, see instructions.

Form 8868 (Rev. 1-2014)

Mailed 1/14/14

Federal Supporting Statements**2013 PG 01**

Name(s) as shown on return

Your Social Security Number

LP AND TERESA ANDERSON FOUNDATION

81-0479060

**FORM 990PF, PART XV, LINE 2
APPLICATION SUBMISSION INFORMATION****GRANT PROGRAM**

SEE GRANT GUIDELINES

APPLICANT NAME

SANDRA K ANDERSON

ADDRESS

PO BOX 190

MILES CITY, MT 59301

TELEPHONE

406-232-3920

EMAIL ADDRESS**FORM & CONTENT**

IN ORDER TO BE CONSIDERED, THE ORGANIZATION IS ASKED TO PLEASE CONTACT THE FOUNDATION FOR THE GRANT APPLICATION AND GUIDELINES. THE APPLICATION INCLUDES THE REQUIREMENT OF A CONCISE PROPOSAL NARRATIVE. THIS NARRATIVE MUST INCLUDE THE ORGANIZATION'S READINESS TO COMPLETE THE PROJECT. THE GUIDELINES MAY BE REQUESTED FROM ADDRESS ABOVE.

SUBMISSION DEADLINE

SEPTEMBER 1 AND MARCH 1

RESTRICTIONS ON AWARD

RESTRICTED TO TAX EXEMPT ORGANIZATIONS OPERATING IN MONTANA WITH PREFERENCE GIVEN TO MILES CITY & CUSTER COUNTY. AREAS OF INTEREST--YOUTH PROGRAMS WHICH INCLUDE YOUTHS AT RISK, SOCIAL SERVICE PROGRAMS, HISTORICAL PRESERVATION PROGRAMS, AND DISASTER VICTIM RELIEF.

Federal Supporting Statements**2013 PG 01**

Name(s) as shown on return

FEIN

LP AND TERESA ANDERSON FOUNDATION

81-0479060

**FORM 990PF, PART II, LINE 10(B)
INVESTMENTS: CORPORATE STOCK SCHEDULE**

STATEMENT #137

<u>CATEGORY</u>	<u>BOY</u>	<u>BOOK VALUE</u>	<u>EOY FMV</u>
SEE SCHEDULE ATTACHED	<u>376,497</u>	<u>376,957</u>	<u>411,584</u>
TOTALS	<u>376,497</u>	<u>376,957</u>	<u>411,584</u>

**FORM 990PF, PART VIII
COMPENSATION EXPLANATION****PG01
STATEMENT #A01****NAME**

SANDRA K ANDERSON

EXPLANATION

SERVES WITHOUT COMPENSATION

**FORM 990PF, PART VIII
COMPENSATION EXPLANATION****PG01
STATEMENT #A02****NAME**

JEFFREY A HUNNES

EXPLANATION

SERVES WITHOUT COMPENSATION

Federal Supporting Statements**2013 PG01**

Name(s) as shown on return

FEIN

LP AND TERESA ANDERSON FOUNDATION

81-0479060

**FORM 990PF, PART VIII
COMPENSATION EXPLANATION**

STATEMENT #A03

NAME

JOHN A TOOKE

EXPLANATION

SERVES WITHOUT COMPENSATION

Federal Supporting Statements

2013 PG 01

Name(s) as shown on return

LP AND TERESA ANDERSON FOUNDATION

Your Social Security Number
81-0479060

FORM 990PF, PART 1, LINE 23 - OTHER EXPENSES SCHEDULE

STATEMENT #103

DESCRIPTION	REVENUE AND EXPENSES	NET INVESTMENT	ADJUSTED NET INCOME	CHARITABLE PURPOSE
DUES	75	0	75	0
INSURANCE	1,050	0	525	525
MISCELLANEOUS EXPENSES	0	0	0	0
OFFICE SUPPLIES	116	39	38	39
TOTALS	1,241	39	638	564

PG 01

STATEMENT #106

FORM 990PF, PART 1, LINE 11 - OTHER INCOME SCHEDULE

DESCRIPTION	REVENUE AND EXPENSES	NET INVESTMENT	ADJUSTED NET INCOME
KINDER MORGAN LLP	1,380	1,380	0
TOTALS	1,380	1,380	0

Federal Supporting Statements

2013 PG 01

Your Social Security Number

81-0479060

Name(s) as shown on return

LP AND TERESA ANDERSON FOUNDATION

STATEMENT #108

FORM 990PF, PART 1, LINE 16(B) - ACCOUNTING FEES SCHEDULE

DESCRIPTION	REVENUE AND EXPENSES	NET INVESTMENT	ADJUSTED NET INCOME	CHARITABLE PURPOSE
ACCOUNTING FEES	4,736	1,562	3,174	0
TOTALS	4,736	1,562	3,174	0

PG 01

STATEMENT #109

FORM 990PF, PART 1, LINE 16(C) - OTHER PROFESSIONAL FEES SCHEDULE

DESCRIPTION	REVENUE AND EXPENSES	NET INVESTMENT	ADJUSTED NET INCOME	CHARITABLE PURPOSE
BOOKKEEPING & SECRETARIAL SERV	2,010	100	1,000	910
FINANCIAL MANAGEMENT FEES	3,751	3,751	0	0
TOTALS	5,761	3,851	1,000	910

Federal Supporting Statements

2013 pg 01

Your Social Security Number

81-0479060

Name(s) as shown on return

LP AND TERESA ANDERSON FOUNDATION

STATEMENT #110

FORM 990PF, PART I, LINE 18 - TAXES SCHEDULE

DESCRIPTION	REVENUE AND EXPENSES	NET INVESTMENT	ADJUSTED NET INCOME	CHARITABLE PURPOSE
FED TAX FY 2013	0	0	0	72
FED TAX FY 2014	97	97	0	0
TOTALS	97	97	0	72

L.P AND TERESA ANDERSON FOUNDATION
ATTACHMENT TO FORM 990-PF
FISCAL YEAR ENDED JUNE 30, 2014
TIN: 81-0479060

PART II - Line 10b--Investments in Corporate Stock, Etc.--Stmt 137--

CERTIFICATE OF DEPOSIT	Book Value* 6/30/2014	Fair Market Value 6/30/2014
-------------------------------	--	--

Certificate of Deposit	100,004	96,530
------------------------	---------	--------

COMMON STOCKS

Pfizer Inc Com 865 000 Shares	27,624	24,826
----------------------------------	--------	--------

The Coca-Cola Company 1075 000 Shares	39,479	42,237
--	--------	--------

Exxon Mobil Corp Com 235 000 Shares	20,155	23,251
--	--------	--------

International Business Machines Corp 105.000 Shares	Sold	0
--	------	---

Kinder Morgan Energy Partners LP Unit LT 255.000 Shares	20,088	20,660
--	--------	--------

Total Common Stocks	\$ 79,722	\$ 86,148
---------------------	-----------	-----------

MUTUAL FUNDS

Blackrock FDS INCM PTF INV A 1695 705 Shares	19,251	19,382
---	--------	--------

Oppenheimer Senior Floating Rate Fund 3323.918 Shares	27,920	27,854
--	--------	--------

Franklin Income Fund Class A 25235.849 Shares	53,504	63,594
--	--------	--------

Hartford Floating Rate FD Class I 6184.971 Shares	Sold	2/24/2014
--	------	-----------

Lord Abbott Short Duration Inc Fd Class A	Sold	7/29/2014
---	------	-----------

L.P AND TERESA ANDERSON FOUNDATION
ATTACHMENT TO FORM 990-PF
FISCAL YEAR ENDED JUNE 30, 2014
TIN: 81-0479060

PART II - Line 10b--Investments in Corporate Stock, Etc.--Stmt 137--

CERTIFICATE OF DEPOSIT	Book Value* 6/30/2014	Fair Market Value 6/30/2014
14395 604 Shares		
PIMCO Total Return Fund Class D 1908.885 Shares	21,161	20,788
Templeton Global Bond Fund Advisor 1634 648 Shares	<u>21,355</u>	<u>21,692</u>
Total Mutual Funds	<u>96,020</u>	<u>189,617</u>
EXCHANGE TRADED PRODUCTS		
Consumer Staples Select Sector SPDR Tr 590.000 Shares	20,426	25,453
I Shares TR Barclays TIPS BD FD 170.000 Shares	Sold	2/24/2014
I Shares TR S&P US Pfd Stk Indes Fund 515.000 Shares	20,131	20,358
SPDR Ser TR S&P Divid ETF 365 000 Shares	<u>20,520</u>	<u>26,941</u>
Total Exchange Traded Products	\$ <u>61,077</u>	\$ <u>114,445</u>
LIMITED PARTNERSHIPS		
Kinder Morgan Energy Partners LP Unit LT 255.000 Shares	<u>20,088</u>	<u>20,660</u>
GRAND TOTALS	\$ <u><u>336,823</u></u>	\$ <u><u>486,740</u></u>

* Book Value equals Cost

L.P AND TERESA ANDERSON FOUNDATION
ATTACHMENT TO FORM 990-PF
FISCAL YEAR ENDED JUNE 30, 2014
TIN: 81-0479060

PART XV - SUPPLEMENTARY INFORMATION--

Grant Awards and Contributions Paid During the Year or Approved for Future Payment

Line 3(a) - Paid during the year

GRANT AWARDS AND CONTRIBUTIONS FUNDED

Name and Address	Foundation Status	Area of Interest	Purpose of Contribution	Amount
T & Y Irrigation Miles City MT	501(c)(3) No Relationship	Preservation	12 Mile Dam Fish Passag	10,000
Miles City 1st Presbyterian Church Miles City MT	501(c)(3) No Relationship	Community Outreach	Memorial	1,000
Total-- Grant Awards and Contributions Funded During Year				<u>11,000</u>

Line 3(b) - Approved for Future Payment

1st United Methodist Church Miles City MT	501(c)(3) No Relationship	Community Outreach	Lunch on Us Program	2,000
Custer County Historical Society Miles City MT	501(c)(3) No Relationship	Preservation	Downtown Revitalization	6,100
Grounds for Change Miles City MT	501(c)(3) No Relationship	Community Outreach	OneHealth Behavioral Program Homeless Task Force	6,000 <u>1,000</u>
				<u>15,100</u>
Total -- Grant Awards and Contributions Funded and Approved During Year				<u><u>26,100</u></u>