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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

Do not enter Social Security numbers on this form as it may be made public.
Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf.

OMB No 1545-0052

2013

Open to Public Inspection

For calendar year 2013 or tax year beginning JUL 1, 2013, and ending JUN 30, 2014

Name of foundation

A Employer identification number

SOUTH EVERETT MUKILTEO ROTARY FOUNDATION

91-1971896

Number and street (or P O box number if mail is not delivered to street address)

Room/suite

PO BOX 3391

B Telephone number

425-347-2244

City or town, state or province, country, and ZIP or foreign postal code

EVERETT, WA 98213-8391

G Check all that apply:

☐

Initial return

☐

Initial return of a former public charity

☐

Final return

☐

Amended return

☐

Address change

☐

Name change

H Check type of organization:

☒

Section 501(c)(3) exempt private foundation

☐

Section 4947(a)(1) nonexempt charitable trust

☐

Other taxable private foundation

I Fair market value of all assets at end of year

(from Part II, col (c), line 16)

\$ 368,435.

J Accounting method:

☒

Cash

☐

Accrual

☐ Other (specify)

(Part I, column (d) must be on cash basis.)

C If exemption application is pending, check here ☐D 1. Foreign organizations, check here ☐2. Foreign organizations meeting the 85% test, check here and attach computation ☐E If private foundation status was terminated under section 507(b)(1)(A), check here ☐F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I Analysis of Revenue and Expenses

(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)

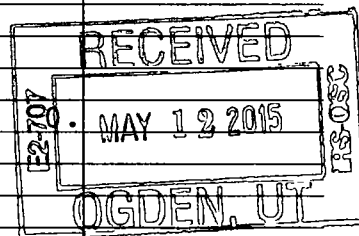
(a) Revenue and expenses per books

(b) Net investment income

(c) Adjusted net income

(d) Disbursements for charitable purposes (cash basis only)

Revenue	1	Contributions, gifts, grants, etc., received	22,097.			
	2	Check ☐ if the foundation is not required to attach Sch B				
	3	Interest on savings and temporary cash investments				
	4	Dividends and interest from securities	9,665.	9,665.	9,665.	STATEMENT 1
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10				
	b	Gross sales price for all assets on line 6a				
	7	Capital gain net income (from Part IV, line 2)		0.		
	8	Net short-term capital gain				
	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)				
	11	Other income	251,177.	0.	251,177.	STATEMENT 2
	12	Total Add lines 1 through 11	282,939.	9,665.	260,842.	
	13	Compensation of officers, directors, trustees, etc	0.	0.	0.	0.
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees				
	b	Accounting fees STMT 3	2,100.	0.	2,100.	0.
	c	Other professional fees				
	17	Interest				
	18	Taxes				
	19	Depreciation and depletion	126.	0.	126.	
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses STMT 4	111,354.	0.	107,384.	3,970.
	24	Total operating and administrative expenses Add lines 13 through 23	113,580.	0.	109,610.	3,970.
	25	Contributions, gifts, grants paid	149,008.			149,008.
	26	Total expenses and disbursements Add lines 24 and 25	262,588.	0.	109,610.	152,978.
	27	Subtract line 26 from line 12				
	a	Excess of revenue over expenses and disbursements	20,351.			
	b	Net investment income (if negative, enter -0-)		9,665.		
	c	Adjusted net income (if negative, enter -0-)			151,232.	

323501
10-10-13

LHA For Paperwork Reduction Act Notice, see instructions

Form 990-PF (2013)

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

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	121,877.	93,617.	93,617.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock			
	c Investments - corporate bonds			
	11 Investments - land, buildings, and equipment basis ▶			
Less: accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other	STMT 6	257,576.	262,316.	272,389.
14 Land, buildings, and equipment: basis ▶	628.			
Less: accumulated depreciation	STMT 7 ▶	199.	555.	429.
15 Other assets (describe ▶ MIRCO LENDING)		2,000.	2,000.	2,000.
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item 1)		382,008.	358,362.	368,435.
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶ STATEMENT 8)		44,073.	76.
23 Total liabilities (add lines 17 through 22)		44,073.	76.	
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		337,935.	358,286.
	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			
	28 Paid-in or capital surplus, or land, bldg., and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
30 Total net assets or fund balances		337,935.	358,286.	
31 Total liabilities and net assets/fund balances		382,008.	358,362.	

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	337,935.
2 Enter amount from Part I, line 27a	2	20,351.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	358,286.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	358,286.

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			
b	NONE		
c			
d			
e			

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
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	
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8		3	

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	82,248.	183,431.	.448387
2011	79,130.	243,308.	.325226
2010	92,780.	327,729.	.283100
2009	73,064.	320,945.	.227653
2008	75,267.	324,558.	.231906

2 Total of line 1, column (d)	2	1.516272
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	.303254
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	348,948.
5 Multiply line 4 by line 3	5	105,820.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	97.
7 Add lines 5 and 6	7	105,917.
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.	8	152,978.

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	97.
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	97.
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	97.
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		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7		0.
8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		97.
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11 Enter the amount of line 10 to be: Credited to 2014 estimated tax ☐ Refunded ☐	11		

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
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. \$ 0. (2) On foundation managers. \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <u>NONE</u>		
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

Form 990-PF (2013)

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>WWW.SEMR.ORG</u>	13	X	
14	The books are in care of ► <u>JULIE LEINHARD</u> Telephone no. ► <u>425-257-1660</u> Located at ► <u>PO BOX 3391, EVERETT, WA</u> ZIP+4 ► <u>98203-3391</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year	15		N/A
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ►	16	Yes	No X

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

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

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

Form 990-PF (2013)

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

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

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?

☐ Yes ☒ No

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

☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☒

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

6b

If "Yes" to 6b, file Form 8870

X

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

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

N/A

7b

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

1 List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 9		0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Total number of other employees paid over \$50,000

0

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. If none, enter "NONE."

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

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

0

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 DEVELOPMENT OF PARTNERSHIPS WITH OTHER COMMUNITY NON-PROFIT ORGANIZATIONS TO SUPPORT EDUCATION, YOUTH ACTIVITIES, SENIOR ACTIVITIES, EDUCATION AND LOW-INCOME CITIZENS.	114,268.
2 SUPPORT OF LOCAL FOOD BANKS TO NEEDY FAMILIES TO REDUCE HUNGER IN THE COMMUNITY.	4,490.
3	
SEE STATEMENT 10	11,525.
4 SCHOLARSHIP PROGRAMS FOR STUDENTS OF LOCAL HIGH SCHOOLS. ANNUAL APPLICATION PROCESS - AWARDS ARE BASED ON ACADEMIC ACHIEVEMENT AND NEED.	14,373.

Part IX-B Summary of Program-Related Investments

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

	Amount
1 N/A	
2	
All other program-related investments. See instructions	
3	
Total. Add lines 1 through 3	0.

Form 990-PF (2013)

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	259,168.
b Average of monthly cash balances	1b	95,094.
c Fair market value of all other assets	1c	
d Total (add lines 1a, b, and c)	1d	354,262.
e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2 Acquisition indebtedness applicable to line 1 assets	2	0.
3 Subtract line 2 from line 1d	3	354,262.
4 Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	5,314.
5 Net value of noncharitable-use assets Subtract line 4 from line 3. Enter here and on Part V, line 4	5	348,948.
6 Minimum investment return Enter 5% of line 5	6	17,447.

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

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	152,978.
b Program-related investments - total from Part IX-B	1b	0.
2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3 Amounts set aside for specific charitable projects that satisfy the:		
a Suitability test (prior IRS approval required)	3a	
b Cash distribution test (attach the required schedule)	3b	
4 Qualifying distributions Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	152,978.
5 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b	5	97.
6 Adjusted qualifying distributions Subtract line 5 from line 4	6	152,881.

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.

Form 990-PF (2013)

Part XIII Undistributed Income (see instructions)

N/A

	(a) Corpus	(b) Years prior to 2012	(c) 2012	(d) 2013
1 Distributable amount for 2013 from Part XI, line 7				
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only				
b Total for prior years:				
3 Excess distributions carryover, if any, to 2013:				
a From 2008				
b From 2009				
c From 2010				
d From 2011				
e From 2012				
f Total of lines 3a through e				
4 Qualifying distributions for 2013 from Part XII, line 4: ► \$				
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)				
d Applied to 2013 distributable amount				
e Remaining amount distributed out of corpus				
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				
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 instr.				
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)				
8 Excess distributions carryover from 2008 not applied on line 5 or line 7				
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				
d Excess from 2012				
e Excess from 2013				

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

- 1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2013, enter the date of the ruling

03/02/06

- b Check box to indicate whether the foundation is a private operating foundation described in section

☒ 4942(j)(3) or ☐ 4942(j)(5)

- 2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

Tax year	Prior 3 years				
(a) 2013	(b) 2012	(c) 2011	(d) 2010	(e) Total	
17,447.	9,172.	12,165.	16,386.	55,170.	
14,830.	7,796.	10,340.	13,928.	46,895.	
152,978.	82,323.	79,208.	92,780.	407,289.	
0.	0.	0.	0.	0.	
152,978.	82,323.	79,208.	92,780.	407,289.	
365,104.	382,008.	336,196.	333,829.	1,417,137.	
365,104.	382,008.	336,196.	333,829.	1,417,137.	
				0.	
				0.	
				0.	
				0.	
				0.	

- b 85% of line 2a

- c Qualifying distributions from Part XII, line 4 for each year listed

- d Amounts included in line 2c not used directly for active conduct of exempt activities

- e Qualifying distributions made directly for active conduct of exempt activities.

Subtract line 2d from line 2c

- 3 Complete 3a, b, or c for the alternative test relied upon:

- a "Assets" alternative test - enter:

- (1) Value of all assets

- (2) Value of assets qualifying under section 4942(j)(3)(B)(i)

- b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed

- c "Support" alternative test - enter:

- (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

- (2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)

- (3) Largest amount of support from an exempt organization

- (4) Gross investment income

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

- 1 Information Regarding Foundation Managers:

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

NONE

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

NONE

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

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

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

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

- c Any submission deadlines:

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

Part XV Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
ACES HIGH SCHOOL 9700 HOLLY DRIVE EVERETT, WA 98204	UNRELATED	PUBLIC SCHOOL	STUDENT ACTIVITIES	650.
AMERICAN RED CROSS 2530 LOMBARD AVE EVERETT, WA 98201	UNRELATED	PUBLIC CHARITY	SUPPORT OPERATING ACTIVITES	5,000.
BUSINESS ENDING SLAVERY & TRAFFICKING PO BOX 14512 SEATTLE, WA 98114	UNRELATED	PUBLIC CHARITY	SUPPORT OPERATING ACTIVITIES	2,000.
CASCADE HIGH SCHOOL 801 E CASINO ROAD EVERETT, WA 98203	UNRELATED	PUBLIC SCHOOL	OPERATIONAL SUPPORT	328.
CASINO ROAD BOYS & GIRLS CLUB 525 W CASINO ROAD EVERETT, WA 98204	UNRELATED	PUBLIC CHARITY	SUPPORT OPERATING ACTIVITIES	4,000.
Total			SEE CONTINUATION SHEET(S)	3a 149,008.
b Approved for future payment				
ANGELA BONSU 12101 23RD AVE W EVERETT, WA 98204	UNRELATED		SCHOLARSHIP	1,000.
ASHLEY CARLSON 12120 272ND AVE NW DUVALL, WA 98019	UNRELATED		SCHOLARSHIP	1,000.
BRANDON POPE 1006 109TH STREET SE EVERETT, WA 98208	UNRELATED		SCHOLARSHIP	1,000.
Total			SEE CONTINUATION SHEET(S)	3b 17,500.

2013.05080 SOUTH EVERETT MUKILTEO ROTA 41891 1

Schedule B(Form 990, 990-EZ,
or 990-PF)Department of the Treasury
Internal Revenue Service**Schedule of Contributors**

▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.
▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and
its instructions is at www.irs.gov/form990.

OMB No 1545-0047

2013

Name of the organization

SOUTH EVERETT MUKILTEO ROTARY FOUNDATION

Employer identification number

91-1971896

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

☐

501(c)() (enter number) organization

☐4947(a)(1) nonexempt charitable trust **not** treated as a private foundation☐

527 political organization

Form 990-PF

☒

501(c)(3) exempt private foundation

☐

4947(a)(1) nonexempt charitable trust treated as a private foundation

☐

501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.**Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.**General Rule**☒

For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II.

Special Rules☐

For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.

☐For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.☐

For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not total to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions of \$5,000 or more during the year.



\$

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2013)

Name of organization

Employer identification number

SOUTH EVERETT MUKILTEO ROTARY FOUNDATION**91-1971896****Part I Contributors** (see instructions) Use duplicate copies of Part I if additional space is needed

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	RODLAND TOYOTA 6816 EVERGREEN WAY EVERETT, WA 98203	\$ 5,200.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)

Name of organization

Employer identification number

SOUTH EVERETT MUKILTEO ROTARY FOUNDATION**91-1971896****Part II Noncash Property** (see instructions) Use duplicate copies of Part II if additional space is needed

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	

Name of organization

Employer identification number

SOUTH EVERETT MUKILTEO ROTARY FOUNDATION**91-1971896****Part III**

Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total more than \$1,000 for the year. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once) ▶ \$ _____

Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

Part XV Supplementary Information**3. Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
CASINO ROAD YOUTH MINISTRIES 14 EAST CASINO ROAD #E EVERETT, WA 98208	UNRELATED	PUBLIC CHARITY	SUPPORT OPERATING ACTIVITIES	2,500.
CHRISTMAS HOUSE PO BOX 717 EVERETT, WA 98206	UNRELATED	PUBLIC CHARITY	SUPPORT OPERATING ACTIVITIES	1,000.
COCOON HOUSE 2929 PINE ST EVERETT, WA 98201	UNRELATED	PUBLIC CHARITY	SUPPORT OPERATING ACTIVITIES	4,000.
CUB SCOUT PACK 27 PO BOX 581 FOX ISLAND, WA 98333	UNRELATED	PUBLIC CHARITY	OPERATIONAL SUPPORT	552.
EAST JEFFERSON ROTARY CLUB PO BOX 654 PORT HADLOW, WA 98339	UNRELATED	SERVICE CLUB	SUPPORT OPERATING ACTIVITIES	2,500.
EVERETT FIREFIGHTERS ASSOCIATION 2411 HEWITT AVENUE EVERETT, WA 98201	UNRELATED	501(C)(4)	OPERATIONAL CONTRIBUTIONS	500.
EXPLORER MIDDLE SCHOOL 9600 SHARON DRIVE EVERETT, WA 98204	UNRELATED	PUBLIC SCHOOL	SUPPORT OPERATING ACTIVITIES	2,500.
FUTURE OF FLIGHT FOUNDATION 8415 PAINE FIELD WAY MUKILTEO, WA 98275	UNRELATED	PUBLIC CHARITY	SUPPORT OPERATING ACTIVITIES	2,000.
HAND IN HAND 14 E CASINO ROAD, SUITE E EVERETT, WA 98208	UNRELATED	PUBLIC CHARITY	OPERATIONAL SUPPORT AND CHILDREN'S PROGRAMS	70,738.
HANDS FOR PEACEMAKING PO BOX 964 EVERETT, WA 98206	UNRELATED	PUBLIC CHARITY	SUPPORT OPERATING ACTIVITIES	12,500.
Total from continuation sheets				137,030.

Part XV Supplementary Information**3. Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
HOPE FOR HEALTH 151 ASCENSION LANE MARSHAL, NC 28755	UNRELATED	PUBLIC CHARITY	SUPPORT OPERATING ACTIVITIES	6,750.
HOUSING HOPE 5830 EVERGREEN WAY EVERETT, WA 98203	UNRELATED	PUBLIC CHARITY	SUPPORT OPERATING ACTIVITIES	1,000.
IMAGINE CHILDRENS' MUSEUM 1502 WALL STREET EVERETT, WA 98201	UNRELATED	PUBLIC CHARITY	SUPPORT OPERATING ACTIVITIES	3,500.
JOSHUA LUCAS WANGADI STREET ADDRESS NOT AVAILABLE EVERETT, WA 98201	UNRELATED		SCHOLARSHIP	3,500.
MADISON ELEMENTARY SCHOOL 616 PECKS DRIVE EVERETT, WA 98203	UNRELATED	PUBLIC SCHOOL	SUPPORT OPERATING ACTIVITIES	1,000.
MARINER HIGH SCHOOL 200 - 120TH STREET SW EVERETT, WA 98204	UNRELATED	PUBLIC SCHOOL	SUPPORT OPERATING ACTIVITIES	2,000.
MUKILTEO FOOD BANK 4514 84TH ST SW MUKILTEO, WA 98275	UNRELATED	PUBLIC CHARITY	SUPPORT OPERATING ACTIVITIES	2,200.
MUKILTEO YMCA 10601 47TH PLACE W MUKILTEO, WA 98275	UNRELATED	PUBLIC CHARITY	SUPPORT OPERATING ACTIVITIES	1,000.
ORPHANS TO AMBASSADORS 4742 42ND AVENUE SW SEATTLE, WA 98116	UNRELATED	PUBLIC CHARITY	SUPPORT OPERATING ACTIVITIES	3,000.
RIJAL CENTRO ADDRESS NOT AVAILABLE	UNRELATED	PUBLIC CHARITY	SUPPORT OPERATING ACTIVITIES	1,000.
Total from continuation sheets				

Part XV Supplementary Information**3. Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
ROTARY CLUB OF SEDRO WOOLEY 703 PACIFIC STREET SEDRO WOOLEY, WA 98284	UNRELATED	SERVICE CLUB	SUPPORT OPERATING ACTIVITIES	5,000.
ROTARY YES PROGRAM 10200 QUILCEDA BLVD TULALIP, WA 98271	UNRELATED	PUBLIC CHARITY	SUPPORT OPERATING ACTIVITIES	2,000.
SNOHOMISH MUSIC PROJECT 1402 SE EVERETT MALL WAY EVERETT, WA 98208	UNRELATED	PUBLIC CHARITY	SUPPORT OPERATING ACTIVITIES	2,000.
ST VINCENT DE PAUL 6430 BROADWAY EVERETT, WA 98203	UNRELATED	PUBLIC CHARITY	SUPPORT OPERATING ACTIVITIES	2,290.
THE HEALING FUND PO BOX 571 STANWOOD, WA 98292	UNRELATED	PUBLIC CHARITY	SUPPORT OPERATING ACTIVITIES	2,000.
Total from continuation sheets				

Part XV Supplementary Information**3. Grants and Contributions Approved for Future Payment (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
DONNY LUU 12114 29TH AVE W EVERETT, WA 98204	UNRELATED		SCHOLARSHIP	1,000.
FRIENDLY WATER FOR THE WORLD 1717 18TH COURT NE OLYMPIA, WA 98506	UNRELATED	PUBLIC CHARITY	SUPPORT OPERATING ACTIVITIES	1,500.
HEATHER PEARSON 9911 MARINE VIEW DR MUKILTEO, WA 98275	UNRELATED		SCHOLARSHIP	1,000.
JAVON LOZANO 805 112TH ST SE EVERETT, WA 98208	UNRELATED		SCHOLARSHIP	1,000.
JESSICA VALENCIA 2 WEST CASINO ROAD #182 EVERETT, WA 98204	UNRELATED		SCHOLARSHIP	1,000.
JOYLYN YANG 5521 112TH PL SW MUKILTEO, WA 98275	UNRELATED		SCHOLARSHIP	1,000.
KARYN ADLEMI FERREIRA-RODRIGUEZ 10131 19TH PL W EVERETT, WA 98204	UNRELATED		SCHOLARSHIP	1,000.
KATHERINE SPENCER 5109 126TH ST SW MUKILTEO, WA 98275	UNRELATED		SCHOLARSHIP	1,000.
MADISON YOUNG 12228 CHAMPIONSHIP CIRCLE MUKILTEO, WA 98275	UNRELATED		SCHOLARSHIP	1,000.
NEFERTARI GRANADOS LARIOS 420 85TH PL SW #S-101 EVERETT, WA 98204	UNRELATED		SCHOLARSHIP	1,000.
Total from continuation sheets				14,500.

Part XV	Supplementary Information
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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)				
NGOC MA 1224 125TH PL SW EVERETT, WA 98204	UNRELATED		SCHOLARSHIP	1,000.
NICHOLAS JANNER 2701 101ST ST SE EVERETT, WA 98208	UNRELATED		SCHOLARSHIP	1,000.
RAFGEI ACHGCOSO 14328 11TH PL W LYNNWOOD, WA 98087	UNRELATED		SCHOLARSHIP	1,000.
REILEY SCHRAEGER 12303 HARBOUR POINTE BLVD #CC204 MUKILTEO, WA 98275	UNRELATED		SCHOLARSHIP	1,000.
Total from continuation sheets				

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
INVESTMENT ACCOUNTS	9,665.	0.	9,665.	9,665.	9,665.
TO PART I, LINE 4	9,665.	0.	9,665.	9,665.	9,665.

FORM 990-PF	OTHER INCOME	STATEMENT	2
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DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
GROSS INCOME FROM SPECIAL FUNDRAISING EVENTS	251,177.	0.	251,177.
TOTAL TO FORM 990-PF, PART I, LINE 11	251,177.	0.	251,177.

FORM 990-PF	ACCOUNTING FEES	STATEMENT	3
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING	2,100.	0.	2,100.	0.
TO FORM 990-PF, PG 1, LN 16B	2,100.	0.	2,100.	0.

FORM 990-PF	OTHER EXPENSES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
PROGRAM EXPENSES	7,101.	0.	3,131.	3,970.
OTHER EXPENSES	1,556.	0.	1,556.	0.
DIRECT COSTS ASSOCIATED WITH FUNDRAISING EVENTS	102,697.	0.	102,697.	0.
TO FORM 990-PF, PG 1, LN 23	111,354.	0.	107,384.	3,970.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	6
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
DA DAVIDSON	FMV	132,687.	145,032.
MORGAN STANLEY	FMV	94,740.	94,496.
UNIT INVESTMENT - MORGAN STANLEY	FMV	34,889.	32,861.
TOTAL TO FORM 990-PF, PART II, LINE 13		262,316.	272,389.

FORM 990-PF	DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT	STATEMENT	7
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DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
COMPUTER	628.	199.	429.
TOTAL TO FM 990-PF, PART II, LN 14	628.	199.	429.

FORM 990-PF	OTHER LIABILITIES	STATEMENT	8
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DESCRIPTION	BOY AMOUNT	EOY AMOUNT
SCHOLARSHIPS	2,625.	0.
LARRY BUSCH FUND	5,547.	0.
ROTARY DISTRICT GRANT	3,600.	0.
MOROCCO ART & WOMEN PROJECT	500.	0.
DOMESTIC VIOLENCE	30,901.	0.
MIRCO LENDING	900.	0.
DUE TO SEMR CLUB	0.	76.
TOTAL TO FORM 990-PF, PART II, LINE 22	44,073.	76.

FORM 990-PF	PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS	STATEMENT	9
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NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
DAN STONE PO BOX 3391 EVERETT, WA 98213	PRESIDENT 3.00	0.	0.	0.
BUZZ RODLAND PO BOX 3391 EVERETT, WA 98213	VICE PRESIDENT 3.00	0.	0.	0.
STEVE SHEA PO BOX 3391 EVERETT, WA 98213	SECRETARY 3.00	0.	0.	0.
DARLENE BIRKETT PO BOX 3391 EVERETT, WA 98213	TREASURER 3.00	0.	0.	0.
DAN LEACH PO BOX 3391 EVERETT, WA 98213	DIRECTOR 3.00	0.	0.	0.
LORNA CORRIGAN PO BOX 3391 EVERETT, WA 98213	DIRECTOR 3.00	0.	0.	0.
VERN ALLEN PO BOX 3391 EVERETT, WA 98213	DIRECTOR 3.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		0.	0.	0.

FORM 990-PF

SUMMARY OF DIRECT CHARITABLE ACTIVITIES

STATEMENT 10

ACTIVITY THREE

DEVELOP AND IMPLEMENT PLANS TO SUPPORT THE ROTARY
INTERNATIONAL FOUNDATION THROUGH BOTH FINANCIAL SUPPORT AND
PROGRAMS PARTICIPATION INCLUDING ANNUAL GIVING, COMMITMENTS
TO THE PERMANENT FUND, AND SUPPORT THE POLIO PLUS PROJECT.

EXPENSES

TO FORM 990-PF, PART IX-A, LINE 3

11,525.

2013 DEPRECIATION AND AMORTIZATION REPORT

FORM 990-PF PAGE 1

990-PF

Asset No	Description	Date Acquired	Method	Life	Line No	Unadjusted Cost Or Basis	Bus % Excl	* Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Current Sec 179	Current Year Deduction
1	COMPUTER	11/17/12	SL	5.00	16	628.			628.	73.		126.
	* TOTAL 990-PF PG 1					628.		0.	628.	73.	0.	126.
	DEPR											