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Form **990-PF**

Return of Private Foundation

OMB No 1545-0052

Department of the Treasury Internal Revenue Service

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.

		gar year 2013 or tax year	pedining 10TT	1, 2013	, and ending	JUN 30, 2014	
Nam	ie of	foundation				A Employer identification	ınumber
J	эн	M M. ROSS FO	UNDATION			99-6007327	1
		nd street (or PO box number if		address)	Room/suite	B Telephone number	
P	. (D. BOX 3170,	DEPT. 715			(808) 694-	4393
City	or to	own, state or province, coul	ntry, and ZIP or foreign p	ostal code		C If exemption application is p	pending, check here
_H	ONO	OLULU, HI 9	<u>6802-3170</u>				
G C	heck	all that apply:	Initial return	Initial return of a fo	rmer public charity	D 1. Foreign organization	s, check here
			Final return	Amended return		2. Foreign organizations m	seturg the 85% test
			Address change	Name change		Foreign organizations me check here and attach or	omputation
H C	_		X Section 501(c)(3) ex		•	E If private foundation sta	
		ction 4947(a)(1) nonexemp rket value of all assets at e		Other taxable private foundang method: X Cash		under section 507(b)(1	• • •
		Part II, col. (c), line 16)		ther (specify)	Accrual	F If the foundation is in a under section 507(b)(1	
্রা ১		-art II, coi. (c), iiile 16) 736		mn (d) must be on cash b	pasis.)	under section 507(b)(1)(b), check here
				(a) Revenue and	(b) Net investment	(c) Adjusted net	(d) Disbursements
		Analysis of Revenue and (The total of amounts in colum necessarily equal the amount	nns (b), (c), and (d) may not s in column (a))	expenses per books	income	income	for charitable purposes (cash basis only)
: ∍	1	Contributions, gifts, grants				N/A	1
300 S	2	Check X if the foundation		,			7.
3	3	Interest on savings and tempor cash investments	rary	7.	7 .		STATEMENT 1
֓֞֟֝֟֟֝֟֝֟֓֓֓֓֓֓֓֓֓֓֓֓֓֓֓֓֓֓֓֓֓֓֓֓֓֓֓֓֓	4	Dividends and interest from		16,787.	16,787	,	STATEMENT 2
ามก	5a	Gross rents					′
3	b	Net rental income or (loss)		, , , , ,	-		1, 1, 1, 1, 1, 1, 1, 1, 1, 1, 1, 1, 1, 1
M o	6a	Net gain or (loss) from sale of a Gross sales price for all		41,920.			3 3 3 4
#566 Jevenue		assets on line 6a	266,941.		,	-	- ` `
<i>የቴ⊎ዬ</i> 3 Revenue		Capital gain net income (from F	*		41,920	<u> </u>	
_	8	Net short-term capital gair	ו		· · · · · · · · · · · · · · · · · · ·		ļ · · · · · · · · · · · · · · · · · · ·
	100	Income modifications Gross sales less returns					*****
	Ι.	and allowances					***
ج ہ	l	Less Cost of goods sold Gross profit or (loss)					
2014	ı	Other income					~ ,
	12	Total. Add lines 1 through	h 11	58,714.	58,714		
L	13	Compensation of officers, dire		10,261.	5,130		5,131.
	14	Other employee salaries a	nd wages			PECEIVED	
	15	Pension plans, employee	benefits			I L O L I I L L	
Ses	16a	Legal fees				201 0 201	30
P. P.	b	Accounting fees	STMT 3	1,475.		DEC 1 0 2014	1,032.
M	C	Other professional fees					一层
	17	Interest	A	600		OGDEN, UT	
	18	Taxes	STMT 4	690.			0.
in it.	19	Depreciation and depletion	n				
E D	20	Occupancy					
Ď	21 22	Travel, conferences, and reprinting and publications	neeungs				
ā	23	Other expenses	STMT 5	2,700.	0		2,700.
iting	24	Total operating and adm		2,700.	<u>U</u>	•	2,700.
Operating and Administrative Expenses		expenses. Add lines 13 ti		15,126.	5,573		8,863.
ò	25	Contributions, gifts, grant	=	25,000.			25,000.
	26	Total expenses and disb	•		·		
_	L	Add lines 24 and 25		40,126.	5,573	•	33,863.
	27	Subtract line 26 from line	12:				
	a	L Excess of revenue over expen	ses and disbursements	18,588.			
	ь	Net investment income (f negative, enter -0-)		53,141		
		Adjusted net income (if no	egative, enter -0-)			NT / A	
3235 10-1	01 0-13	LHA For Paperwork R	eduction Act Notice, see	instructions.		j4 a	Form 990-PF (2013)
					1	<i>j</i> . ·	1110

Forr	n 99	0-PF (2013) JOHN M. ROSS FOUNDATION		99-6	5007327 Page 2
D.	art	Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year	End of	year
	21 6	Balance Sneets column should be for end-of-year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash - non-interest-bearing	1,785.	462.	462.
	2	Savings and temporary cash investments	14,138.	15,535.	15,535.
l	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 ▶			
g	8	Inventories for sale or use			=
Assets	9	Prepaid expenses and deferred charges			
As	10a	Investments - U.S. and state government obligations			
		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	593,024.	611,538.	720,475.
	14	Land, buildings, and equipment basis			
		Less accumulated depreciation			** *
	15	Other assets (describe ►			
	16	Total assets (to be completed by all filers - see the			
		instructions. Also, see page 1, item 1)	608,947.	627,535.	736,472.
	17	Accounts payable and accrued expenses			
	18	Grants payable			*
Ś	19	Deferred revenue			
Liabilities	20	Loans from officers, directors, trustees, and other disqualified persons			
abil	21	Mortgages and other notes payable			
Ξ	22	Other liabilities (describe >			
					•
	23	Total liabilities (add lines 17 through 22)	0.	0.	"
		Foundations that follow SFAS 117, check here			; ,
		and complete lines 24 through 26 and lines 30 and 31.			
Net Assets or Fund Balances	24	Unrestricted			
aŭ	25	Temporarily restricted			
Ва	26	Permanently restricted			*
ը		Foundations that do not follow SFAS 117, check here			
Ę		and complete lines 27 through 31.			*
Š	27	Capital stock, trust principal, or current funds	608,947.	627,535.	, ,
set	28	Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	ı
As	29	Retained earnings, accumulated income, endowment, or other funds	0.	0.	,
Net	30	Total net assets or fund balances	608,947.	627,535.	~
	31	Total liabilities and net assets/fund balances	608,947.	627,535.	
10	art	III Analysis of Changes in Net Assets or Fund B	alances		
	<u>aı .</u>	<u> </u>		·-	
1	Tota	il net assets or fund balances at beginning of year - Part II, column (a), line	30		
	•	st agree with end-of-year figure reported on prior year's return)		1	608,947.
		er amount from Part I, line 27a		2	18,588.
-		er increases not included in line 2 (itemize)		3	0.
4		lines 1, 2, and 3		4	627,535.
5		reases not included in line 2 (itemize)		5	0.
6	Tota	l net assets or fund balances at end of year (line 4 minus line 5) - Part II, co	olumn (b), line 30	6	627,535.
					Form 990-PF (2013)

99-6007327

JOHN M. ROSS FOUNDATION

See the Part VI instructions.

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.

Part VII Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(b), or 4948 - see instructions)	_	990-PF (2013) JOHN M. ROSS FOUNDATION		6007			Page 4
Date of fulling or determination letter: (attach copy of letter if necessary-se incrutions) 1 1,063 Domestic foundations that meet the section 4940(e) requirements in Part V, check here 1 1,063 Domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, cot. (b). 2 2 0. 3 3 1,063 3 3 1,063 3 3 3 1,063 3 3 3 1,063 3 3 3 1,063 3 3 3 1,063 3 3 3 1,063 3 3 3 1,063 3 3 3 1,063 3 3 3 1,063 3 3 3 1,063 3 4 0. 5 5 5 5 5 5 5 5 5 6 5 5 5 6 6 5 5 6 6 6 5 6 6 6 5 6 6 6 5 6 6 5 7 7 7 7 7 5 7 7 7 7 7 5 7 7 7 7 7 5 7 7 7 7 7 5 7 7 7 7 7 7 5 7 7 7 7 7 7 5 7 7 7 7 7 7 5 7 7 7 7 7 7 5 8 7 7 7 7 7 5 7 7 7 7 7 7 7 5 7 7 7 7 7 7 7 5 7 7 7 7 7 7 7 7 5 7 7 7 7 7 7 7 7 7			948	- see II	nstru	CTIOF	IS)
b Domestic foundations that meet the section 4947(a) requirements in Part IV, check here □ and enter 1% of Part I, line 27b. All other domestic foundations state? 2% of the 27b. Exempl forego 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 Add lines 1 and 2 3 1, 063. Add lines 1 and 2 Subtile A (income) lax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 5 Tax based on investment income. Subtract line if from line 3. If zero or less, enter -0- 5 Tax based on investmental on the from 198 all it zero or less, enter -0- 5 Cededis/Payments: 2 2013 estimated tax payments and 2012 overpayment credited to 2013 6 a 560. 6 b Exempt foreign organizations - tax withheld at source 6 a 1,583. 6 a 1,583. 6 a 1,583. 7 2,143. 8 there any equally for undergayment of estimated tax Check here	1a						
or Part I, line 27b A dich ther domestic conditions enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b). Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) A doft lines 1 and 2 Subtitle A (nome) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 5 A subtitle A (nome) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3. It zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3. It zero or less, enter -0- 5 Exempt foreign organizations - tax withheld at source 6 Description of the control organizations - tax withheld at source 6 Description organizations - tax withheld at source 6 Description organizations - tax withheld at source 6 Description organizations - tax withheld at source 7 Captal with application for extension of time to left (Form 8868) 8 Extension organizations - tax withheld at source 8 Description organizations - tax withheld at source 9 Total credits and payments. Add lines 8 through 6d 8 Extension organizations organizations - tax withheld at source 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 9 Tax due. If the total or lines 5 and 8 is more than line 7, enter amount owed 9 Tax due. If the total or lines 5 and 8 is more than line 7, enter amount owed 10 Overpayment. If line 7 is more than the lond of lines 5 and 8, enter the amount owed 11 Total or distribution of the formation of the source of the activities and copies of any materials published or distribution or the formation or connection with the activities 12 Total or formation line from 112							
e All other domestic foundations enter 2% of the 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-) 3 Add lines 1 and 2 4 Subtile A (income) lax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 5 Tax based on investment incomes. Subtract line 4 from line 3. It zero or less, enter -0- 5 Tax based on investment incomes. Subtract line 4 from line 3. It zero or less, enter -0- 5 Tax based on investment incomes. Subtract line 4 from line 3. It zero or less, enter -0- 5 Tax based on investment incomes. Subtract line 4 from line 3. It zero or less, enter -0- 5 Tax based on investment incomes. Subtract line 4 from line 3. It zero or less, enter -0- 6 Exempt foreign organizations - tax withhold at source 6 I ax pard with application for extension of time to lite (Form 8868) 6 Exempt foreign organizations - tax withhold at source 6 I ax pard with application for extension of time to lite (Form 8868) 6 Exempt foreign organizations - tax withhold at source 7 I ax dive. If the total of lines 5 and 8 is more than line 7, enter amount of 884 7 Total credits and payments. Add lines 5 at through 6d 8 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount of 90 Overgayment. Illine 7 is more than 16 to be Credited to 2014 attinisted tax. Payment of 90 Overgayment. Illine 7 is more than 16 to be Credited to 2014 attinisted tax. Payment of 90 Overgayment. Illine 7 is more than 16 to be Credited to 2014 attinisted tax. Payment of 90 Overgayment. Illine 7 is more than 16 to be Credited to 2014 attinisted tax. Payment organization of did participate or intervene in any political campaign? 1 Enter the amount of line 10 to be Credited to 2014 attinisted tax. Payment organization or did it participate or intervene in any political campaign. In the activities of 90 Overgayment (1 any) of tax on political expenditures (section 495) imposes (se	þ		1_			1,0	<u>63.</u>
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 3 1,063. 4 Add lines 1 and 2 4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 5 Tax based on investment lineares. Subtract line 4 from line 3.1 zero or less, enter -0- 5 Tax based on investment lineares. Subtract line 4 from line 3.1 zero or less, enter -0- 5 Tax based on investment lineares. Subtract line 4 from line 3.1 zero or less, enter -0- 5 Tax based on investment lineares. Subtract line 4 from line 3.1 zero or less, enter -0- 5 Tax based on investment lineares. Subtract line 4 from line 3.1 zero or less, enter -0- 6 B		·	1				,
3 1,063. Subtate A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only, Others enter -0-) Tax based on investment income. Subtract lime 4 from line 3, 1 zero or less, enter -0- Tax based on investment income. Subtract lime 4 from line 3, 1 zero or less, enter -0- Tax based on lavestment income. Subtract lime 4 from line 3, 1 zero or less, enter -0- Exempt foreign organizations - tax withheld at source Tax paid with application for extension of time to file (Form 8869) Exempt foreign organizations - tax withheld at source Total credits and payments. Add lines 6a through 64 Enter any pentilly for underpayment of estimated tax. Check here [X] if Form 2220 is attached Total credits and payments. Add lines 6a through 64 Enter any pentilly from representative the service of							,
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5 1 x based on investment income. Subtract line 4 from line 3, if zero or less, enter -0- 6 CreditsPayments. 2 2013 estimated tax payments and 2012 overpayment credited to 2013 6 b Exempt foreign organizations - tax withheld at source 6 a 1 x paid with application for extension of time to the (Form 8869) 6 Backup withholding erroneously withheld 7 Total credits and payments. Add lines 6a through 64 8 Tax dae. If the total of lines 5 and 8 is more than line 7, enter amount own the state of the total of lines 5 and 8 is more than line 7, enter amount own the state in the 2 state. If the total of lines 5 and 8 is more than line 7, enter amount own the state of the total of lines 5 and 8 is more than the total of lines 5 and 8, enter the amount own the 10 obs Credited to 2014 estimated tax ► 1 During the lax year, did the foundation attempt to influence any national, state, or local legislation or did if participate or intervene in any political campaign? 1 During the tax year, did the foundation attempt to influence any national, state, or local legislation or did if participate or intervene in any political campaign? 1 During the tax year, did the foundation attempt to influence any national, state, or local legislation or did if participate or intervene in any political campaign? 2 During the tax year, did the foundation in exemption of the activities. 3 If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities of the definition? 4 If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities. 5 Out the foundation the Form 112-PO-NL for this year? 5 If Yes, attach a detailed description of the activities. 6 Einter the amount (fany) fat x on political expenditures (section 4955) imposed during the year? 1 If Yes, attach a detailed description of the activities. 6 Einter the arimount (fany) fat x on political expenditures (section 4955) imposed during the year? 1 If Yes, attach he attached the statement required by General Instruction of the Changes 4 D	_	· · · · · · · · · · · · · · · · · · ·	3	ļ		1,0	
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b Exempt foreign organizations - tax withheld at source c Tax paid with application for extension of time to file (Form 8868) d Backup withholding erroneously withheld 7 Total credits and payments. Add lines 58 athrough 60 8 Enter any penalty for underpayment of estimated tax. Cheok here ☑ if Form 2220 is attached 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 10 Overpayment. If line? I's more than the total of lines 5 and 8, enter the amount owed 10 Overpayment. If line? I's more than the total of lines 5 and 8, enter the amount overpaid 11 Enter the amount of line 10 to be: Credited to 2014 estimated tax ► 1, 080 . Refunded ► 11 During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or interviere in any political campaign? 1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or interviere in any political campaign? 1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? 1b 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. 1 Did the foundation in Promision of the activities. 2 Eats the foundation has on political expenditures (section 4955) imposed during the year: (1) On the foundation made any changes, not previously reported to the IRS? 2 Yes, Tract an detailed description of the activities. 3 Has the foundation made any changes, not previously reported to the IRS; in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes 3 Yes, Tract the statement required by General Instruction of II in the year? 3 Yes, Tract and detailed description of the activities are provided by a state legislation that effectively amends th							
c Tay paid with application for extension of time to file (Form 8868) d Backup withholding erroneously withhold T Total credits and payments. Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax. Check here [X] if form 2220 is attached 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 Enter the amount of line 10 to be. Gredited to 2014 estimated tax 1 to 10 to							
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7 Total credits and payments. Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax. Check here X if Form 2220 is attached 9 Tax due. If the total of lines 5 and 6 is more than line 7, enter amount owed 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount ower paid 11 Enter the amount of line 10 to be. Credited to 2014 estimated tax > 1, 080 . Refunded 11 0. 0. Part VII-A Statements Regarding Activities 1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? 1a 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? 1b 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. c Did the foundation his Form 1120-PDL for this year? d Enter the amount (if any) or tax on political expenditures (section 4955) imposed during the year. (1) On the foundation. Ps. S. O. (2) On foundation managers. Ps. S. O. e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. Ps. S. O. (2) On foundation managers. Ps. S. O. (3) On foundation managers. Ps. S. O. (4) On foundation managers. Ps. S. O.			<u>.</u>			,	Ţ,
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8a Enter the states to which the foundation reports or with which it is registered (see instructions) HI 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 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 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses 10 X	7		1/				
HI 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 9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? If "Yes," complete Part XIV 9 X 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses 10 X	,	bid the foundation have at least \$5,000 in assets at any time during the year? If tes, complete Fait II, coi. (c), and Fait X	V			^	
HI 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 9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? If "Yes," complete Part XIV 9 X 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses 10 X	Q:	Foter the states to which the foundation reports or with which it is registered (see instructions)				}	1
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 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 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses 10 X	ve						
of each state as required by General Instruction G? If "No," attach explanation 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 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses 10 X	1						
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 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses 10 X					94	Y	1
year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? If "Yes," complete Part XIV 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses 10 X	٥		landar		-00	1	+
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses 10 X	,		ioriual		a	1	x
	10	·				 	
		in 169, attach a scring mer hanes and addresses		Fni)-PF	_

	990-PF (2013) JOHN M. ROSS FOUNDATION 99-6007	<u> 327</u>		Page 5					
Pa	rt 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		T						
	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 ► N/A		X						
14	The books are in care of ▶ BANK OF HAWAII Telephone no. ▶ (808)	694	-43	93					
	Located at ►130 MERCHANT STREET, HONOLULU, HI ZIP+4 ►96								
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	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,		Yes	No					
	securities, or other financial account in a foreign country?	16		X					
	See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign								
	country								
Pa	nrt 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?	1	- 1	•					
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)								
	a disqualified person?			;					
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?		l	1					
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?			. !					
	(5) Transfer any income or assets to a disqualified person (or make any of either available								
	for the benefit or use of a disqualified person)?		*	1					
	(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.)		,	. '					
t	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations			i					
	section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?	1b		X					
	Organizations relying on a current notice regarding disaster assistance check here								
(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		<u> </u>					
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation								
	defined in section 4942(j)(3) or 4942(j)(5)):			:					
1	At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning								
	before 2013?			,					
	If "Yes," list the years \blacktriangleright								
1	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect			. 1					
	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	2b							
(c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.		-						
	<u> </u>								
3	a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time			•					
	during the year?			_					
1	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.)	36	<u> </u>						
	a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	<u> </u>	X					
	b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that		1						
	had not been removed from jeopardy before the first day of the tax year beginning in 2013?	4b		X					

orm 990-PF (2013) JOHN M. ROSS FOUNDATION			<u>99-60073</u>	27	Page 6
Part VII-B Statements Regarding Activities for Which F	orm 4720 May Be P	lequired (continu	ed)		
5a During the year did the foundation pay or incur any amount to:					T.
(1) Carry on propaganda, or otherwise attempt to influence legislation (section	4945(e))?	Ye:	x X No		,
(2) Influence the outcome of any specific public election (see section 4955); or	to carry on, directly or indire	ctly,			,
any voter registration drive?			s X No	1	1 -
(3) Provide a grant to an individual for travel, study, or other similar purposes?)	Ye:	s 🗶 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)?		Ye	s X No		,
(5) Provide for any purpose other than religious, charitable, scientific, literary,	or educational purposes, or f			1	
the prevention of cruelty to children or animals?		Ye	s X No		٠ .
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify und	er the exceptions described i	n Regulations			
section 53.4945 or in a current notice regarding disaster assistance (see instru	ctions)?			5b	X
Organizations relying on a current notice regarding disaster assistance check hi	ere				-
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption fr	om the tax because it maintai	ned		-	
expenditure responsibility for the grant?	N	「∕A □ Ye	s No		1
If "Yes," attach the statement required by Regulations section 53.4945	5-5(d).			٠.	-
6a Did the foundation, during the year, receive any funds, directly or indirectly, to p	pay premiums on			1	
a personal benefit contract?		Ye	s X No		
b Did the foundation, during the year, pay premiums, directly or indirectly, on a p	ersonal benefit contract?		<u>_</u>	6b	X
If "Yes" to 6b, file Form 8870.				-	
7a At any time during the tax year, was the foundation a party to a prohibited tax s	helter transaction?	Ye	s 🔀 No 📙		
b If "Yes," did the foundation receive any proceeds or have any net income attribu			_N/A	7b	
Part VIII Information About Officers, Directors, Trustoral Paid Employees, and Contractors	ees, Foundation Ma	nagers, Highly	<i>'</i>		
List all officers, directors, trustees, foundation managers and their		(c) Compensation	(d) Contributions to	(0)	
(a) Name and address	(b) Title, and average hours per week devoted to position	(If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	accou	xpense int, other wances
	TRUSTEE				
P.O. BOX 3170				•	
HONOLULU, HI 96802-3170	1.00	10,261.	0 .	,	0.
					
				-	
				<u> </u>	
				ļ	
				ľ	
2 Compensation of five highest-paid employees (other than those inc		enter "NONE."	(d) Contributore to	1 , , ,	
(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	1 40000	Expense unt, other wances
NONE					
	<u> </u>	<u> </u>			
		<u> </u>			
The Laurence of other ampleures and supplied and a CO					
Total number of other employees paid over \$50,000			<u> </u>	000 5	0

orm 990-PF (2013) JOHN M. ROSS FOUNDATION		5007327 Page 7
Part VIII Information About Officers, Directors, Trustees, Foundate Paid Employees, and Contractors (continued)	tion Managers, Highly	
3 Five highest-paid independent contractors for professional services. If none, enter	"NONE."	
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
		<u> </u>
Total number of others receiving over \$50,000 for professional services Part IX-A Summary of Direct Charitable Activities		<u>▶</u> 0
List the foundation's four largest direct charitable activities during the tax year. Include relevant statist number of organizations and other beneficiaries served, conferences convened, research papers prod	ical information such as the uced, etc.	Expenses
1 <u>N/A</u>		
2		
3		
3		
4		
Part IX-B Summary of Program-Related Investments Describe the two largest program-related investments made by the foundation during the tax year on	lines 1 and 2.	Amount
1 N/A		
2		
All other program-related investments. See instructions. 3		
Total. Add lines 1 through 3		0.

Form 990-PF (2013) Page 8 JOHN M. ROSS FOUNDATION 99~6007327 Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.) 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 694,605. 1a b Average of monthly cash balances 1b 18,762. c Fair market value of all other assets 1c 713,367. d Total (add lines 1a, b, and c) 1d e Reduction claimed for blockage or other factors reported on lines 1a and 0. 1c (attach detailed explanation) Acquisition indebtedness applicable to line 1 assets 2 Subtract line 2 from line 1d 3 Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions) 4 10.701 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4 5 702,666. Minimum investment return. Enter 5% of line 5 35,133. 6 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.) Minimum investment return from Part X, line 6 35,133. 1 1,063. 2a Tax on investment income for 2013 from Part VI, line 5 Income tax for 2013. (This does not include the tax from Part VI.) 2b ,063. Add lines 2a and 2b Distributable amount before adjustments. Subtract line 2c from line 1 3 34,070. 3 Recoveries of amounts treated as qualifying distributions 4 5 Add lines 3 and 4 5 Deduction from distributable amount (see instructions) 6 6 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 Qualifying Distributions (see instructions) Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes: 33,863. a Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26 1a b Program-related investments - total from Part IX-B 1b Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes 2 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 Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4 4 33,863.

Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation gualifies for the section

Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment

income. Enter 1% of Part I, line 27b

Adjusted qualifying distributions. Subtract line 5 from line 4

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		- <u></u>		34,070.
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only		· · · · · · · · · · · · · · · · · · ·	0.	
b Total for prior years:		0		
3 Excess distributions carryover, if any, to 2013:		0.		
a From 2008 11,990.				
b From 2009				
c From 2010 321.				
dFrom 2011 1,383.				
e From 2012				
f Total of lines 3a through e	13,694.			
4 Qualifying distributions for 2013 from				
Part XII, line 4: ►\$ 33,863.				
a Applied to 2012, but not more than line 2a			0.	
b Applied to undistributed income of prior				
years (Election required - see instructions)		0.		
c Treated as distributions out of corpus				
(Election required - see instructions)	0.			
d Applied to 2013 distributable amount				33,863.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a))	207.			207.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	13,487.			:
b Prior years' undistributed income. Subtract				· · · · · · · · · · · · · · · · · · ·
line 4b from line 2b		0.		
c Enter the amount of prior years'				
undistributed income for which a notice of				
deficiency has been issued, or on which the section 4942(a) tax has been previously				'
assessed		0.	,	
d Subtract line 6c from line 6b. Taxable				
amount - see instructions		0.	,	
e Undistributed income for 2012. Subtract line				
4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2013. Subtract				
lines 4d and 5 from line 1. This amount must				
be distributed in 2014				0.
7 Amounts treated as distributions out of				
corpus to satisfy requirements imposed by				
section 170(b)(1)(F) or 4942(g)(3)	0.	·		
8 Excess distributions carryover from 2008	44 500			
not applied on line 5 or line 7	11,783.			
9 Excess distributions carryover to 2014.	1 704			
Subtract lines 7 and 8 from line 6a	1,704.		<u> </u>	
10 Analysis of line 9:				
a Excess from 2009				
b Excess from 2010 321. c Excess from 2011 1,383.				
d Excess from 2012 e Excess from 2013				
6 EV0022 HOUR TO 10		<u> </u>	<u> </u>	Form 990-PF (2013)

	ROSS FOUND				007327 Page 10
Part XIV Private Operating Fo			I-A, question 9)	N/A	
1 a If the foundation has received a ruling or		· · · · · · · · ·			
foundation, and the ruling is effective for		=	▶ └		
b Check box to indicate whether the found		g foundation described		4942(j)(3) or	4942(j)(5)
2 a Enter the lesser of the adjusted net	Tax year	(1) 0040	Prior 3 years	111 0040	
income from Part I or the minimum	(a) 2013	(b) 2012	(c) 2011	(d) 2010	(e) Total
investment return from Part X for					
each year listed	·				
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not		-			
used directly for active conduct of exempt activities					
e Qualifying distributions made directly			 		
for active conduct of exempt activities.	,				
Subtract line 2d from line 2c 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:					
 Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) 					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(III)					
(3) Largest amount of support from					
an exempt organization					
(4) Gross investment income					
Part XV Supplementary Info			if the foundati	on had \$5,000 or	more in assets
		140(10113.)	 		
Information Regarding Foundation List any managers of the foundation where year (but only if they have contributed in the state of the stat	no have contributed more		ntributions received by	the foundation before the	close of any tax
NONE	. ,				
b List any managers of the foundation who other entity) of which the foundation ha			n (or an equally large p	ortion of the ownership of	a partnership or
NONE	<u>-</u>				
2 Information Regarding Contribut					
Check here if the foundation in the foundation makes gifts, grants, etc.	only makes contributions (see instructions) to indi-	to preselected charitable viduals or organizations	e organizations and do under other condition	es not accept unsolicited r s, complete items 2a, b, c,	equests for funds. If and d.
a The name, address, and telephone num SEE ATTACHMENT: ROSS		the person to whom ap	olications should be ad	dressed:	
b The form in which applications should SEE ATTACHMENT: ROSS		ation and materials they	should include:		
c Any submission deadlines: SEE ATTACHMENT: ROSS					
d Any restrictions or limitations on award		cal areas, charitable field	s. kinds of institutions	or other factors:	
SEE ATTACHMENT: ROSS		a succession in the succession	o, ando or moments.	or strict ractors.	

3 Grants and Contributions Paid During the		ayment		
Recipient	If recipient is an individual, show any relationship to	Foundation	Purpose of grant or	Amount
Name and address (home or business)	any foundation manager or substantial contributor	status of recipient	contribution	74110d1tt
a Paid during the year				
BIG BROTHERS BIG SISTERS HAWAII			HAWAII ISLAND - SALARY	
418 KUWILI ST, STE 106			SUPPORT FOR SCHOOL	
HONOLULU, HI 96817		··	BASED MENTORING, FYE 12/31/14	5,000
POHAHA I KA LANI P.O. BOX 412			KAHULI PROGRAM, FYE	
KURTISTOWN, HI 96760			12/31/14	5,000
UNIVERSITY OF HAWAII FOUNDATION			HAWAII ISLAND STUDENTS	
2444 DOLE ST. BACHMAN HALL 105			ATTENDING UH CAMPUS,	
HONOLULU, HI 96822			AY 2014 - 2015	15,000
				
Total			▶ 3a	25 000
b Approved for future payment				
NONE				
		<u> </u>		
Total		L	▶ 3b	

JOHN M. ROSS FOUNDATION

(a) Business (b) Codes Amount Codes (d) Related to function and business (d) Amount Codes (d) Related to function and business (d) Amount Codes (d) Related to function and business (d) Amount Codes (d) Related to function and business (d) Related to function and business (d) Related to function and business (d) Related to function (d) Relat	(e)	n 512, 513, or 514	Excluded by s	isiness income	Unrelated b	nounts unless otherwise indicated.	nter arace or
a b c c d d	or exempt n income	(d) Relati	(C) Exclu- sion	(b)	(a) Business		
b c c d d							_
G d d e e e e e e e e e e e e e e e e e							
de e f f g Fees and contracts from government agencies Membership dues and assessments Interest on savings and temporary cash investments							
g Fees and contracts from government agencies Membership dues and assessments Interest on savings and temporary cash investments Dividends and interest from securities Net rental income or (loss) from real estate: a Debt-financed property b Not debt-financed property b Not debt-financed property Cither investment income Gain or (loss) from sales of assets other than inventory Net income or (loss) from sales of inventory Other revenue: a b c d d Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes line No. Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of							
f g Fees and contracts from government agencies Membership dues and assessments Interest on savings and temporary cash investments Dividends and interest from securities Net rental income or (loss) from real estate: a Debt-financed property b Not debt-financed property Net rental income or (loss) from personal property Other investment income Gain or (loss) from sales of assets other than inventory Net income or (loss) from special events Gross profit or (loss) from sales of inventory Other revenue: a b c c d d e Subtotal. Add columns (b), (d), and (e) Total. Add lone 12, columns (b), (d), and (e) Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes ine No. Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of							_
Membership dues and assessments Interest on savings and temporary cash Investments Dividends and interest from securities Not rental income or (loss) from real estate: a Debt-financed property b Not debt-financed property b Not debt-financed property Cither investment income Gain or (loss) from sales of assets other than inventory Net income or (loss) from special events Gross profit or (loss) from sales of inventory Other revenue: a b c c d d e Subtotal. Add columns (b), (d), and (e) c e worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of							·
Membership dues and assessments Interest on savings and temporary cash investments Dividends and interest from securities Not rental income or (loss) from real estate: a Debt-financed property b Not debt-financed property Net rental income or (loss) from personal property Other investment income Gain or (loss) from sales of assets other than inventory Net income or (loss) from special events Gross profit or (loss) from sales of inventory Other revenue: a b c c d d e Subtotal. Add columns (b), (d), and (e) e worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of				· · · · · · · · · · · · · · · · · · ·		nd contracts from government agencies	a Fees at
Interest on savings and temporary cash investments 14 7. Dividends and interest from securities 114 16,787. Net rental income or (loss) from real estate: a Debt-financed property b Not debt-financed property Net rental income or (loss) from personal property Other investment income Gain or (loss) from sales of assets other than inventory Net income or (loss) from special events Gross profit or (loss) from sales of inventory Other revenue: a b c d d e Subtotal. Add columns (b), (d), and (e) 58,714. Total. Add line 12, columns (b), (d), and (e) 58,714. Total. Add line 12, columns (b), (d), and (e) 58,714. Total. Add line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of							_
Investments Dividends and interest from securities Net rental income or (loss) from real estate: a Debt-financed property b Not debt-financed property Net rental income or (loss) from personal property Other investment income Gain or (loss) from sales of assets other than inventory Net income or (loss) from special events Gross profit or (loss) from sales of inventory Other revenue: a b c d d e Subtotal. Add columns (b), (d), and (e) e worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes ine No. Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of							
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the foundation's exempt purposes (other than by providing funds for such purposes).				olumn (e) of Part XVI-	ne is reported in i	Explain below how each activity for which inco	
				for such purposes).	by providing fund	the foundation's exempt purposes (other than	V
							

Part X			M. RUSS FO	SOLO TO T	nd Transcetions	and Dalas			Pa	ge 13
rart A	411	Exempt Organi		siers to a	nu transactions	and Relati	onships With Nonchar	itable	•	
1 Did 1	he org			of the following	with any other organizat	ion described in	section 501(c) of		Yes	No
					7, relating to political orga	nizations?				
a Tran	sfers f	om the reporting founda	ation to a noncharitab	ole exempt org	anization of:					
(1)	Cash							1a(1)		_X_
, ,	Other							1a(2)		X
		actions:								
		of assets to a noncharital						1b(1)		_ <u>x</u> _
		ises of assets from a nor		rganization				1b(2)		_ <u>x</u> _
		of facilities, equipment,	or other assets					1b(3)		X
		ursement arrangements						1b(4)		X
		or loan guarantees						1b(5)		X
		mance of services or me						1b(6)		X
	_	facilities, equipment, ma				huava ahaw tha	fair market value of the goods, o	1c	L	X
					• •		action or sharing arrangement, s		seis,	
		the value of the goods,			ou iess man ian market va	iuc iii ariy trafis	action of sharing arrangement, s	III WUII		
(a) Line no		b) Amount involved			exempt organization	(d) Desc	cription of transfers, transactions, and s	sharing ar	rangeme	
(-)	1		\	N/A		(4)				
	† —									
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								-	-	
		· · · · · · · · · · · · · · · · · · ·								
										
										
	+-									
	-									
	 _									
		•	•	•	or more tax-exempt orga	nizations descri	bed	٦.,	7.7	л
		501(c) of the Code (other	٠,,)(3)) or in sect	110N 5277		L_	Yes	LX	☐ No
<u> 0 11 1</u>	es, co	mplete the following sch (a) Name of org			(b) Type of organization	<u> </u>	(c) Description of relations	hin		
		N/A	ganization		(b) Type of organization	<u>' </u>	(c) Description of relations:	iiip		
		N/A				-				
				· · · · · · · · · · · · · · · · · · ·		 				
		······································	· · · · · · · · · · · · · · · · · · ·			 				
				 						
					ng accompanying schedules ar			y the IRS	discuss	this
Sign	and be		mplete Declaration of pro HAWAII, <u>Inuste</u> e	eparer (other tha	n taxpayer) is based on all info	rmation of which p	retu	irn with the	ne prepa	rer
Here		Om	nyth		DEC 0 1 201	14		Ye		No
	Sign	ature of officer or trustee	Vice President		Date	Title				
		Print/Type preparer's na	ame	Preparer's s	ignature	Date	Check if PTIN			
							self- employed			
Paid										
Prepa		Firm's name					Firm's EIN ▶			
Use (Unly									
		Firm's address								
							Phone no			

FORM 990-PF INTERE	ST ON SAVIN	IGS AND TEM	PORARY	CASH IN	VESTMENTS	STATEMENT	1
SOURCE	REVE	REVENUE NET INV		(B) VESTMENT COME	(C) ADJUSTED NET INCOM		
DREYFUS CASH MANANG	EMENT		7.		7.		<u> </u>
TOTAL TO PART I, LI	NE 3		7.		7.		
FORM 990-PF	DIVIDENDS	S AND INTER	EST FRO	M SECUR	ITIES	STATEMENT	2
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	RE	(A) VENUE BOOKS	(B) NET INVES MENT INCO		
BOH #215023409	22,707	5,92	0.	16,787.	16,78	7.	
TO PART I, LINE 4	22,707	5,92	0.	16,787.	16,78	37.	
FORM 990-PF		ACCOUNTI	NG FEES			STATEMENT	3
DESCRIPTION		(A) EXPENSES PER BOOKS	(B NET IN MENT I	VEST-	(C) ADJUSTED NET INCOM		
TAX SERVICE FEE		1,475.		443.		1,0	32.
TO FORM 990-PF, PG	1, LN 16B	1,475.		443.		1,0	32.
FORM 990-PF		TAX	ES	<u> </u>		STATEMENT	4
DESCRIPTION		(A) EXPENSES PER BOOKS		VEST- NCOME	(C) ADJUSTEI NET INCOM		
FYE 6/30/14 ESTIMAT TAXES FYE 6/30/13 TAXES D		560. 130.		0.			0.
TO FORM 990-PF, PG	1, LN 18	690.	· 	0.	 		0.
	=						

FORM 990-PF OTHER EXPENSES		EXPENSES	STATEMENT 5		
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVE MENT INC		(C) ADJUSTED NET INCOM	
GRANTS ADMINISTRATION FEES	2,700.		0.		2,700.
TO FORM 990-PF, PG 1, LN 23	2,700	•	0.		2,700.
FORM 990-PF	OTHER IN	VESTMENTS			STATEMENT (
DESCRIPTION	_	ALUATION METHOD	вос	OK VALUE	FAIR MARKET VALUE
	-			611,538.	700 475
SEE STATEMENT - INV		COST		011,556.	720,475.

Form **8868** (Rev. January 2014)

Department of the Treasury Internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return

File a separate application for each return.

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

OMB No. 1545-1709

Application Return Is For Application Is For Reference Form 990 or Form 990-EZ 01 Form 990-T (corporation) 0 Form 990-BL 02 Form 1041-A 0 Form 4720 (individual) 03 Form 4720 (other than individual) 0 Form 990-PF 04 Form 5227 1 Form 990-T (sec. 401(a) or 408(a) trust) 05 Form 6069 1	f you are filing for an Additional (Not Automatic) 3-Month	lete only Pa	A A and about the box			, (==	
Contact complete Pert II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868. Electronic filling (e-file). You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (e finish for a corporation of time to file any of the form 990-T) on a additional (not automatic) 3-month extension of time. You can electronically file Form 8980 for equest an extension from 16 file form 990-T) on a additional (not automatic) 3-month extension of time. You can electronically file Form 8980 for equest an extension in 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, institution in the exception of Form 8970, 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, institution of the paper format (see instructions). For more details on the electronic filing of this form, institution or formatic 3-month extension of time for the increme face of the file form 990-T and requesting an automatic 6-month extension or check this box and complete. Part I Automatic 3-Month Extension of Times. Only submit original (no copies needed). Acceptoration required to file Form 990-T and requesting an automatic 6-month extension or check this box and complete. Part I Automatic 3-Month Extension of Times. Only submit original (no copies needed). **Continual original file formation of the file and transfer or file and trusts must use Form 7004 to request an extension of time to riginal file formation of the file formation of the file file formation of the file file formation of the file file formation of time file file formation of time file file file file file file file f	,	-				لكنا 🔻	i
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 equired to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to require the file for the form 990-T and or Part II with the exception of Form 8970. For more details on the electronic filing of this form, insit www.rs.gov/lefile and click on e-file for Chantes & Nonprofits. Part I Automatic 3-Monthe 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 Lother corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns. Figure or I and the corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns. Figure or I and the filer's identifying number (Employer identification number (Employer identification). Enter the Return code for the return that this application is for (file a separate application for each return). Quapplication for form 990-Employer identi	not complete Part II unless you have already been grante	Extension, c	omplete only Part II (on page 2 of	this form).			
equired to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 9868 to request an extension from the 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, insit www irs.gov/effile and click on e-file for Chanties & 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 and the corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time on the incinent size returns. Figure or bits income tax re		d an automa	tic 3-month extension on a previous	sly filed For	m 8868.		
If 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, is trawn vis. gov/effle and click on e-file for Chantes & 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 and I only and I only and I only submit original (no copies needed). All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time of the Income tax returns. Formation of the Income tax returns. Part I only N. ROSS FOUNDATION Number, street, and room or suite no. If a P.O. box, see instructions. JOHN M. ROSS FOUNDATION Number, street, and room or suite no. If a P.O. box, see instructions. P. O. BOX 3170, DEPT. 715 City, town or post office, state, and ZIP code. For a foreign address, see instructions. HONOLULU, HI 96802-3170 Enter the Return code for the return that this application is for (file a separate application for each return) Quality of Form 990-EZ The f	ctronic filing (e-file). You can electronically file Form 8868	if you need a	3-month automatic extension of tir	ne to file (6	months f	for a corporation	п
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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 2 fart 1 only All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time of file income tax returns. Enter filer's identifying number. Employer dentification number (E JOHN M. ROSS FOUNDATION 99-6007327 Number, street, and room or suite no. If a P.O. box, see instructions. Po O. BOX 3170, DEPT. 715 City, town or post office, state, and ZIP code. For a foreign address, see instructions. HONOLULU, HI 96802-3170 Enter the Return code for the return that this application is for (file a separate application for each return) Application Return Application Return Code Is For Gorm 990-F Form 990-T (corporation) BANK OF HAWAII Telephone No. ► (808) 694-4393 Fax No. ► BANK OF HAWAII Telephone No. ► (808) 694-4393 Form 1720 (individual) Form 990-T (trust other than above) BANK OF HAWAII Telephone No. ► (808) 694-4393 Fax No. ► BANK OF HAWAII Telephone No. ► (808) 694-4393 Fax No. ► BANK OF HAWAII Telephone No. ► (808) 694-4393 Fax No. ► BANK OF Hawaii in the care of Fax No. ► BANK OF Hawaii in the organization or four digit Group Exemption Number (GEN) If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) If this is for a fire the whole group, check this box ► I request an automatic Amonth (6 months for a corporation requented to file Form 990-T) extension of time until FEBRUARY 15, 2015 To file the exempt organization return for the organization named above. The extension is for.	rsonal Benefit Contracts, which must be sent to the IRS in p	aper format (see instructions). For more details	on the elec	tronic filin	ng of this form,	
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Application Series Power Part 1 only Application Series Power Form 990 or Form 990-E Form 990-B Form 990-B Form 990-F Fo	art I Automatic 3-Month Extension of Tir	ne. Only s	ubmit original (no copies ne	eded).			
All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time of life income tax returns. Chile but the filer's identifying number of the filer's identifying number (Employer identification number (ESN) Outpoint	orporation required to file Form 990-T and requesting an au	tomatic 6-mo	nth extension - check this box and	complete			_
Type or vint JOHN M. ROSS FOUNDATION 99-6007327 Number, street, and room or suite no. If a P.O box, see instructions. Enter filler's identifying number (Employer identification number (Espin) number (Employer identification number (Employer identifi	rt I only .	•		•		▶ □	
Name of exempt organization or other filer, see instructions. JOHN M. ROSS FOUNDATION Number, street, and room or suite no. If a P.O box, see instructions. P. O. BOX 3170, DEPT. 715 City, town or post office, state, and zIP code. For a foreign address, see instructions. HONOLULU, HI 96802-3170 Enter the Return code for the return that this application is for (file a separate application for each return) Quantity of the return that this application is for (file a separate application for each return) Return Code Is For Code Is For Code Is For 990-BL Form 990 or Form 990-EZ O1 Form 990-T (corporation) Form 990-PF O4 Form 5227 Form 990-PF O4 Form 5227 Form 990-T (sec. 401(a) or 408(a) trust) The books are in the care of ▶ 130 MERCHANT STREET - HONOLULU, HI 96813 Telephone No. ▶ (808) 694-4393 Fax No. ▶ If it it s for part of the group, check this box I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until FEBRUARY 15, 2015, to file the exempt organization return for the organization named above. 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 FEBRUARY 15, 2015, to file the exempt organization return for the organization named above. The extension		EMICs, and ti	rusts must use Form 7004 to reque	st an extens	sion of tin	ne	
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JOHN M. ROSS FOUNDATION FORM 990-PF, PART II, LINE 13 FOR YEAR ENDED 06/30/2014

Description	Units	Book Value	Market Value
003019395 ABERDEEN INTERNATIONAL EQUITY FUND INST	1964 896	19,381 96	31,871 00
003021409 ABERDEEN CORE FIXED INCOME FUND CL !	4231 337	46,183 61	46,206.00
003021698 ABERDEEN ASIA-PACIFIC EX-JAPAN EQUITY FUND INSTITUTIONAL CLASS	2288 730	•	28,151 00
197199631 COLUMBIA ACORN INTERNATIONAL CL R5	290.179	10,714.54	14,198.00
314172560 FEDERATED STRATEGIC VALUE DIVIDEND FUND CL INST	10616.986	48,625 80	67,524 00
38142Y773 GOLDMAN SACHS LARGE CAP VALUE FD - INST	2085 418	21,563.22	38,121.00
411511306 HARBOR INTL FD	442.037	32,388.05	32,781 00
47803W406 JOHN HANCOCK III DISC M/C-IS	1374 162	17,465 60	26,686.00
543487326 NATIXIS LOOMIS SAYLES LTD GOV AND AGCY FD CL Y	2880 759	33,861.99	33,734.00
56062X641 MAINSTAY LARGE CAP GROWTH FUND CL I	3602.470	21,254.58	38,691.00
56062X708 MAINSTAY HIGH YIELD CORP BOND FUND CL I	773.794	4,526 70	4,751 00
74144Q203 T ROWE PRICE INSTITUTIONAL EMERGING MARKETS EQUITY FUND	898.889	27,998.27	28,414.00
74316J458 CONGRESS MID CAP GROWTH-INS	1642.261	22,203 37	22,827.00
74972H648 RS GLOBAL NATURAL RESOURCES FUND CL Y	497 708	20,313.71	19,689.00
77958B402 T ROWE PRICE INSTITUTIONAL FLOATING RATE FUND CL I	443.990	4,284.50	4,569.00
78462F103 SPDR S&P 500 ETF TRUST	250.000	39,994 42	48,930.00
880208400 TEMPLETON GLOBAL BOND FUND CL AD	699 074	9,398 51	9,305 00
884116401 THIRD AVENUE REAL ESTATE VALUE FUND CL IS	626.732	14,402 30	19,955 00
921909792 VANGUARD TOTAL INTERNATIONAL STOCK INDEX FUND CL SI	896 877	30,465.00	31,328.00
921937835 VANGUARD TOTAL BOND MARKET ETF	512.000	42,853.45	42,097 00
921937868 VANGUARD TOTAL BOND MARKET INDEX FD	2311 876	24,852 71	25,038.00
922908488 VANGUARD TOTAL STOCK MARKET INDEX FUND	2209 372	100,080 66	105,609 00
TOTAL PORTFOLIO		611,537.70	720,475.00

John M. Ross Foundation

Bank of Hawaii, Trustee

Grant Application Information for Program

Grantmaking Policy

John M. Ross Foundation regularly accepts unsolicited grant requests from qualified tax-exempt 501 (c)(3) charitable organizations on the Big Island of Hawaii that have programs or projects focusing on teens from 11-18 years of age.

PRIORITY WILL BE GIVEN TO PROGRAMS/PROJECTS THAT SUPPORT TEENS WHO HAVE HIGHER NEEDS AND LIMITED ACCESS. The following are examples of what Ross Foundation considers to be "higher needs and limited access": financial need, little or no family support, limited access to transportation, resources, and/or activities.

The Governing Board wishes to continue its support of <u>teen</u> programs. Organizations from various sectors on the Big Island are invited to submit a grant request to John M. Ross Foundation for *possible* funding consideration ranging from \$1,000 - \$5,000. The funds cannot be used toward large capital projects.

DEADLINE: Applications must be postmarked by February 1.

APPLICATION PROCEDURES - A thru D

Submit Four (4) completed sets of the proposal containing:

- (A) Funding Request cover sheet To be placed on top of each set (see page 4).
- (B) Proposal Narrative Provide who, what, when, where, why, and how in three pages or less.

Narrative Format Information:

Pages: Maximum 3 pages

Margins: 1-inch margins on each side

Font: 12 point font

Spacing: Double space in between paragraphs Paragraph Height: Maximum of 1 ½ inches

Bullet points: Acceptable

Narrative Headings: Use these 7 (seven) headings in the order listed:

- 1) Organization: Briefly describe your organization's mission and programs. (maximum of 3 sentences)
- 2) <u>Population to be Served</u>: Provide an estimated UNDUPLICATED number and age range of the eligible individuals you propose to serve.
 - If the projections are an increase over the current volume, provide information on current volume (percentages can only be used if accompanied with figures, i.e. 20% over 500).
- 3) Program/Project: Describe using specific information in layman terms.
 - (Acronyms must be explained in the narrative and budgets.)
- 4) Goals & Objectives: Separately list each goal with corresponding objective, and specifically describe how the goal will be accomplished through the objective.
- 5) Outreach: For new, expansion, or existing program/project:
 - o Describe how your organization will market the program/project to the community you propose to serve.
 - Provide an estimated UNDUPLICATED number of group/individuals who will be new participants
 - Provide UNDUPLICATED numbers for existing participants/groups/individuals.
- 6) Evaluation: Provide information on how and/or what the following measures are that will be used to evaluate the program/project (note: pre/post-tests are not acceptable):
 - o Process Measures extent to how the program/project will be implemented
 - o Outcome Measures effectiveness in meeting goals and objectives
- 7) Cost: Total cost of the program/project, amount requested, and plans for future support.

(C) These 7 items must be attached to each of the 4 (four) sets of the proposal narrative

- Staff: Describe the qualifications of the staff or volunteers who will oversee and coordinate the program/project
- Board of Directors List of Board members with their professional or business affiliation.
 - Percent who actively participate in activities and attend meetings
- Endorsement Letters Two letters endorsing the activity

(The following items must have a Start & End date that includes: month, day and year)

- Project/Program Budget
 - List all revenue (funding sources) and expenses for the project or program.
 - Requests for small capital and/or to purchase equipment require additional information to validate the expenses in the project budget (i.e. estimates from vendors).
- Organization's Operating Budget Current Fiscal Year
 - If funding is for support during the following fiscal year, also provide a DRAFT of Operating Budget for such year.
- Income Statement Recently Completed Fiscal Year
- Current Balance Sheet (not older than three months)

(D) IRS, Charters, By-Laws, Articles of Incorporation

Provide One copy only:

- Internal Revenue Service letter advising that the organization is tax-exempt under Section 501(c) (3) of the Code, and its status under 509(a).
- Organization's charter and bylaws
- Articles of Incorporation if applicable

Proposals are to be sent to the following address:

Postal Service John M. Ross Foundation c/o Bank of Hawaii. Trustee Charitable Foundation Services #758 P. O. Box 3170 Honolulu, Hawaii 96802-3170

Over night deliveries John M. Ross Foundation c/o Bank of Hawaii, Trustee Charitable Foundation Services #758 130 Merchant Street, Room 530 Honolulu, Hawaii 96813

Due to security measures in the building, hand-delivered proposals are strongly discouraged.

Applicants will be notified in writing of the action taken on their requests. The recipient of a grant will be required to submit a narrative report specific to the Foundation's Reporting Guidelines on what has been accomplished as a result of the grant, and a fiscal accounting of the grant expenditures.

This invitation to submit a grant proposal does not guarantee your organization will be selected to receive any funding. The Foundation may receive more requests for assistance than its funds permit supporting. However, normally, all applications are considered, and each is acted upon according to its current and projected relative merit, provided it is in keeping with the deed of trust.

Contact Information for John M. Ross Foundation:

Paula Boyce, AVP & Grants Administration Officer Phone: (808) 694-4945 Fax: (808) 694-4006

Email address: paula.boyce@boh.com

Elaine Moniz, Administrative Assistant Phone: (808) 694-4944 Fax: (808) 694-4006 Email address: elaine.moniz@boh.com

Toll-free from Neighbor Islands: 1-800-272-7262

John M. Ross Foundation (Bank of Hawaii, Trustee)

Funding Request Cover Sheet (Program)

(TYPE all information, except for signatures, and submit with your request for funding.)

Date	
(Must be a 501 (c	tation Information c) (3) tax-exempt organization) mit names of collaborating agencies on a separate sheet.)
Name:	
Complete Address:	
Phone:	Fax:
BOARD M	EMBER INFORMATION
No. of Board Members: Per	rcent (%) of Financial Participation:
Total Contribution During Fiscal Year: (Check One: Past or Current FY)	Median Gift: Average Gift:
Cont	act Information
Name:	Title:
Complete Address:	
Phone:	Email:
Proj	ect Information
Program Title:	
Amount requested: \$	
Two sign	natures are required
Executive Director (Chief Compensated Staff)	Board Chair or President (Chief Volunteer)
Print or Type Name and Title	Print or Type Name and Title