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Form 990-PF

## Return of Private Foundation

OMB No 1545-0052

2013

Department of the Treasury  
Internal Revenue Serviceor Section 4947(a)(1) Trust Treated as Private Foundation  
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Information about Form 990-PF and its separate instructions is at [www.irs.gov/form990pf](http://www.irs.gov/form990pf)

Open to Public Inspection

For calendar year 2013 or tax year beginning

08/01, 2013, and ending

07/31, 2014

Name of foundation  
J.K. MULLEN FOUNDATION 61A059015

Number and street (or P.O. box number if mail is not delivered to street address) Room/suite  
5310 DTC PARKWAY SUITE C

City or town, state or province, country, and ZIP or foreign postal code  
GREENWOOD VILLAGE, CO 80111

G Check all that apply.  
☐ Initial return  
☐ Final return  
☐ Address change  
☐ Initial return of a former public charity  
☐ Amended return  
☐ 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) \$ 5,989,519.

J Accounting method  
☒ Cash  
☐ Accrual  
☐ Other (specify) \_\_\_\_\_  
 (Part I, column (d) must be on cash basis)

A Employer identification number  
84-6002475

B Telephone number (see instructions)  
-

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) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1	Contributions, gifts, grants, etc., received (attach schedule)				
2	Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
3	Interest on savings and temporary cash investments				
4	Dividends and interest from securities	123,838.	123,838.		STMT 1
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	299,691.			
b	Gross sales price for all assets on line 6a	957,807.			
7	Capital gain net income (from Part IV, line 2)		299,691.		
8	Net short-term capital gain				
9	Income modifications				
10a	Gross sales less returns and allowances				
b	Less Cost of goods sold				
c	Gross profit or (loss) (attach schedule)				
11	Other income (attach schedule)				
12	Total. Add lines 1 through 11	423,529.	423,529.		
13	Compensation of officers, directors, trustees, etc.	17,026.	12,769.		4,257.
14	Other employee salaries and wages		NONE	NONE	
15	Pension plans, employee benefits		NONE	NONE	
16a	Legal fees (attach schedule) STMT 3	283.	NONE	NONE	283.
b	Accounting fees (attach schedule) STMT 4	2,725.	NONE	NONE	2,725.
c	Other professional fees (attach schedule) STMT 5	47,935.	39,806.		8,129.
17	Interest				
18	Taxes (attach schedule) (see instructions) STMT 6	5,535.	1,311.		4,224.
19	Depreciation (attach schedule) and depletion	699.			
20	Occupancy	4,815.			4,815.
21	Travel, conferences, and meetings		NONE	NONE	
22	Printing and publications		NONE	NONE	
23	Other expenses (attach schedule) STMT 7	6,365.	100.		6,265.
24	Total operating and administrative expenses. Add lines 13 through 23	85,383.	53,986.	NONE	30,698.
25	Contributions, gifts, grants paid	225,950.			225,950.
26	Total expenses and disbursements. Add lines 24 and 25	311,333.	53,986.	NONE	256,648.
27	Subtract line 26 from line 12				
a	Excess of revenue over expenses and disbursements	112,196.			
b	Net investment income (if negative, enter -0-)		369,543.		
c	Adjusted net income (if negative, enter -0-)				

JSA For Paperwork Reduction Act Notice, see instructions.

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Form 990-PF (2013)

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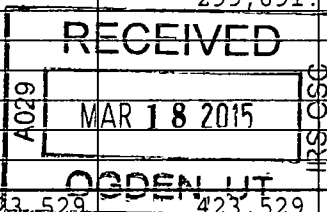
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Rec in Batch/Corres Og

Revenue  
Operating and Administrative Expenses

me

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing . . . . .		4,173.	7,162.	7,162.
	2	Savings and temporary cash investments . . . . .		175,431.	189,081.	189,081.
	3	Accounts receivable ▶ . . . . .				
		Less: allowance for doubtful accounts ▶ . . . . .				
	4	Pledges receivable ▶ . . . . .				
		Less: allowance for doubtful accounts ▶ . . . . .				
	5	Grants receivable . . . . .				
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . .				
	7	Other notes and loans receivable (attach schedule) ▶ . . . . .				
		Less: allowance for doubtful accounts ▶ . . . . .	NONE			
	8	Inventories for sale or use . . . . .				
	9	Prepaid expenses and deferred charges . . . . .				
	10 a	Investments - U S and state government obligations (attach schedule) . . . . .	STMT 8	53,258.	50,831.	51,203.
	b	Investments - corporate stock (attach schedule) . . . . .	STMT 9	795,454.	591,871.	1,036,572.
	c	Investments - corporate bonds (attach schedule) . . . . .	STMT 10	55,908.	50,000.	54,907.
	11	Investments - land, buildings, and equipment basis ▶ . . . . .	9,980.			
	Less: accumulated depreciation (attach schedule) ▶ . . . . .	7,382.	3,297.	2,598.		
12	Investments - mortgage loans . . . . .					
13	Investments - other (attach schedule) . . . . .	STMT 11	4,550,052.	3,420,689.	4,650,594.	
14	Land, buildings, and equipment basis ▶ . . . . .	9,981.				
	Less: accumulated depreciation (attach schedule) ▶ . . . . .	7,382.	2,466.	2,599.	STMT 13	
15	Other assets (describe ▶ . . . . .)					
16	Total assets (to be completed by all filers - see the instructions Also, see page 1, item I) . . . . .		5,640,039.	4,314,831.	5,989,519.	
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 (attach schedule) . . . . .				
	22	Other liabilities (describe ▶ . . . . .)				
23	Total liabilities (add lines 17 through 22) . . . . .				NONE	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.					
	24	Unrestricted . . . . .				
	25	Temporarily restricted . . . . .				
	26	Permanently restricted . . . . .				
	Foundations that do not follow SFAS 117, . . . ▶ <input checked="" type="checkbox"/> check here and complete lines 27 through 31.					
	27	Capital stock, trust principal, or current funds . . . . .		5,640,039.	4,314,831.	
	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 (see instructions) . . . . .		5,640,039.	4,314,831.	
	31	Total liabilities and net assets/fund balances (see instructions) . . . . .		5,640,039.	4,314,831.	

### 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	5,640,039.
2	Enter amount from Part I, line 27a . . . . .	2	112,196.
3	Other increases not included in line 2 (itemize) ▶ . . . . .	3	
4	Add lines 1, 2, and 3 . . . . .	4	5,752,235.
5	Decreases not included in line 2 (itemize) ▶ CORRECTING INVESTMENT VALUE FROM FMV TO BOOK VALUE . . . . .	5	1,437,404.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 . . . . .	6	4,314,831.

**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.)
<b>1a PUBLICLY TRADED SECURITIES</b>						
<b>b</b>						
<b>c</b>						
<b>d</b>						
<b>e</b>						
(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)			
<b>a</b> 957,807.		658,116.	299,691.			
<b>b</b>						
<b>c</b>						
<b>d</b>						
<b>e</b>						
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69						
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0- or Losses (from col. (h))			
<b>a</b>			299,691.			
<b>b</b>						
<b>c</b>						
<b>d</b>						
<b>e</b>						
<b>2</b> Capital gain net income or (net capital loss) $\left\{ \begin{array}{l} \text{If gain, also enter in Part I, line 7} \\ \text{If (loss), enter -0- in Part I, line 7} \end{array} \right\}$				<b>2</b>	299,691.	
<b>3</b> Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8 $\left\{ \begin{array}{l} \text{If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in} \\ \text{Part I, line 8} \end{array} \right\}$				<b>3</b>		

**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	298,699.	5,370,320.	0.055620
2011	287,981.	5,050,090.	0.057025
2010	311,762.	5,374,468.	0.058008
2009	284,226.	5,012,517.	0.056703
2008	306,679.	4,503,604.	0.068096
<b>2</b> Total of line 1, column (d)			<b>2</b> 0.295452
<b>3</b> 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			<b>3</b> 0.059090
<b>4</b> Enter the net value of noncharitable-use assets for 2013 from Part X, line 5			<b>4</b> 5,741,550.
<b>5</b> Multiply line 4 by line 3			<b>5</b> 339,268.
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)			<b>6</b> 3,695.
<b>7</b> Add lines 5 and 6			<b>7</b> 342,963.
<b>8</b> 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.			<b>8</b> 256,648.

**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 <input type="checkbox"/> and enter "N/A" on line 1 . . . . .		1	7,391.
Date of ruling or determination letter _____ (attach copy of letter if necessary - see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b . . . . .			
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) . . . . .		2	
3 Add lines 1 and 2 . . . . .		3	7,391.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) . . . . .		4	NONE
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- . . . . .		5	7,391.
6 Credits/Payments.			
a 2013 estimated tax payments and 2012 overpayment credited to 2013 . . . . .	6a 3,165.		
b Exempt foreign organizations - tax withheld at source . . . . .	6b NONE		
c Tax paid with application for extension of time to file (Form 8868) . . . . .	6c 5,500.		
d Backup withholding erroneously withheld . . . . .	6d		
7 Total credits and payments. Add lines 6a through 6d . . . . .		7	8,665.
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached . . . . .		8	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed . . . . .		9	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid . . . . .		10	1,274.
11 Enter the amount of line 10 to be Credited to 2014 estimated tax <input type="checkbox"/> 1,274. Refunded <input type="checkbox"/> 11		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)? . . . . .		X
If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		
c Did the foundation file Form 1120-POL for this year? . . . . .		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation <input type="checkbox"/> \$ (2) On foundation managers <input type="checkbox"/> \$		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? . . . . .		X
If "Yes," attach a detailed description of the activities		
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes . . . . .		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? . . . . .		X
If "Yes," attach the statement required by General Instruction T		
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state 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) <input type="checkbox"/> CO		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation. . . . .	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? If "Yes," complete Part XIV. . . . .		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses. . . . .		X

**Part VII-A Statements Regarding Activities (continued)**

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

**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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> 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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)? <input type="checkbox"/>	1b	X
Organizations relying on a current notice regarding disaster assistance check here <input type="checkbox"/>		
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? <input type="checkbox"/>	1c	
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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
If "Yes," list the years <input type="checkbox"/>		
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.) <input type="checkbox"/>	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. <input type="checkbox"/>		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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) <input type="checkbox"/>	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? <input type="checkbox"/>	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? <input type="checkbox"/>	4b	X

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**Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)****5a** During the year did the foundation pay or incur any amount to(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions) ☐ Yes ☒ No(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☐ No**b** If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)? ☐ Yes ☐ NoOrganizations relying on a current notice regarding disaster assistance check here ☐ **5b****c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ No

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

**6a** Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? ☐ Yes ☐ No **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 shelter transaction? ☐ Yes ☒ No**b** If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? ☐ Yes ☐ No **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 (see instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 15		17,026.		

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

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

**Total** number of other employees paid over \$50,000 ☐ **NONE**

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**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors** (continued)**3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE."**

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

**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 NONE	
2	
3	
4	

**Part IX-B Summary of Program-Related Investments** (see instructions)

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

Amount

1 NONE	
2	
All other program-related investments. See instructions	
3 NONE	
Total. Add lines 1 through 3 . . . . .	

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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
<b>a</b>	Average monthly fair market value of securities	<b>1a</b>	5,685,786.
<b>b</b>	Average of monthly cash balances	<b>1b</b>	143,199.
<b>c</b>	Fair market value of all other assets (see instructions)	<b>1c</b>	NONE
<b>d</b>	<b>Total</b> (add lines 1a, b, and c)	<b>1d</b>	5,828,985.
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b>	NONE
<b>3</b>	Subtract line 2 from line 1d	<b>3</b>	5,828,985.
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	<b>4</b>	87,435.
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4.	<b>5</b>	5,741,550.
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5	<b>6</b>	287,078.

**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.)

<b>1</b>	Minimum investment return from Part X, line 6	<b>1</b>	287,078.
<b>2a</b>	Tax on investment income for 2013 from Part VI, line 5	<b>2a</b>	7,391.
<b>b</b>	Income tax for 2013. (This does not include the tax from Part VI.)	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b	<b>2c</b>	7,391.
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1.	<b>3</b>	279,687.
<b>4</b>	Recoveries of amounts treated as qualifying distributions	<b>4</b>	NONE
<b>5</b>	Add lines 3 and 4	<b>5</b>	279,687.
<b>6</b>	Deduction from distributable amount (see instructions)	<b>6</b>	NONE
<b>7</b>	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	<b>7</b>	279,687.

**Part XII Qualifying Distributions** (see instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
<b>a</b>	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	<b>1a</b>	256,648.
<b>b</b>	Program-related investments - total from Part IX-B	<b>1b</b>	
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	NONE
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the:		
<b>a</b>	Suitability test (prior IRS approval required)	<b>3a</b>	NONE
<b>b</b>	Cash distribution test (attach the required schedule)	<b>3b</b>	NONE
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4.	<b>4</b>	256,648.
<b>5</b>	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions)	<b>5</b>	N/A
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	<b>6</b>	256,648.

**Note.** The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

**Part XIII Undistributed Income** (see instructions)

	(a) Corpus	(b) Years prior to 2012	(c) 2012	(d) 2013
<b>1</b> Distributable amount for 2013 from Part XI, line 7 . . . . .				279,687.
<b>2</b> Undistributed income, if any, as of the end of 2013				
<b>a</b> Enter amount for 2012 only . . . . .			NONE	
<b>b</b> Total for prior years 20____, 20____, 20____		NONE		
<b>3</b> Excess distributions carryover, if any, to 2013				
<b>a</b> From 2008 . . . . .	85,979.			
<b>b</b> From 2009 . . . . .	34,872.			
<b>c</b> From 2010 . . . . .	50,040.			
<b>d</b> From 2011 . . . . .	36,947.			
<b>e</b> From 2012 . . . . .	32,714.			
<b>f</b> Total of lines 3a through e . . . . .	240,552.			
<b>4</b> Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 256,648.				
<b>a</b> Applied to 2012, but not more than line 2a . . . . .			NONE	
<b>b</b> Applied to undistributed income of prior years (Election required - see instructions) . . . . .		NONE		
<b>c</b> Treated as distributions out of corpus (Election required - see instructions) . . . . .	NONE			
<b>d</b> Applied to 2013 distributable amount . . . . .				256,648.
<b>e</b> Remaining amount distributed out of corpus . . . . .	NONE			
<b>5</b> Excess distributions carryover applied to 2013 . (If an amount appears in column (d), the same amount must be shown in column (a) )	23,039.			23,039.
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	217,513.			
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b . . . . .		NONE		
<b>c</b> 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 . . . . .		NONE		
<b>d</b> Subtract line 6c from line 6b. Taxable amount - see instructions . . . . .		NONE		
<b>e</b> Undistributed income for 2012. Subtract line 4a from line 2a. Taxable amount - see instructions . . . . .			NONE	
<b>f</b> Undistributed income for 2013. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2014 . . . . .				
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions) . . . . .	NONE			
<b>8</b> Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions) . . . . .	62,940.			
<b>9</b> Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a . . . . .	154,573.			
<b>10</b> Analysis of line 9				
<b>a</b> Excess from 2009 . . . . .	34,872.			
<b>b</b> Excess from 2010 . . . . .	50,040.			
<b>c</b> Excess from 2011 . . . . .	36,947.			
<b>d</b> Excess from 2012 . . . . .	32,714.			
<b>e</b> Excess from 2013 . . . . .				

**Part XIV Private Operating Foundations** (see instructions and Part VII-A, question 9)**NOT APPLICABLE**

**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 . . . . .

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

N/A

**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.

N/A

**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.

SEE STATEMENT 18

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

SEE ATTACHED STATEMENT FOR LINE 2

**c** Any submission deadlines

SEE ATTACHED STATEMENT FOR LINE 2

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

SEE ATTACHED STATEMENT FOR LINE 2

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
SEE STATEMENT 35				225,950.
<b>Total</b> . . . . .			<b>3a</b>	225,950.
<b>b</b> <i>Approved for future payment</i>				
<b>Total</b> . . . . .			<b>3b</b>	

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.		Unrelated business income		Excluded by section 512, 513, or 514		(e)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	Related or exempt function income (See instructions.)
1	Program service revenue					
a						
b						
c						
d						
e						
f						
g	Fees and contracts from government agencies					
2	Membership dues and assessments . . . . .					
3	Interest on savings and temporary cash investments					
4	Dividends and interest from securities . . . . .			14	123,838.	
5	Net rental income or (loss) from real estate					
a	Debt-financed property . . . . .					
b	Not debt-financed property . . . . .					
6	Net rental income or (loss) from personal property .					
7	Other investment income . . . . .					
8	Gain or (loss) from sales of assets other than inventory			18	299,691.	
9	Net income or (loss) from special events . . . . .					
10	Gross profit or (loss) from sales of inventory . . .					
11	Other revenue a					
b						
c						
d						
e						
12	Subtotal. Add columns (b), (d), and (e) . . . . .				423,529.	
13	Total. Add line 12, columns (b), (d), and (e) . . . . .					423,529.

(See worksheet in line 13 instructions to verify calculations.)

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 the foundation's exempt purposes (other than by providing funds for such purposes). (See instructions.)

NOT APPLICABLE

**Part XVII** Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations


- |   |              |            |           |
|---|--------------|------------|-----------|
| <b>1</b> Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?  |              | <b>Yes</b> | <b>No</b> |
|   |              |            |           |
| <b>a</b> Transfers from the reporting foundation to a noncharitable exempt organization of:   |              |            |           |
| <b>(1)</b> Cash   | <b>1a(1)</b> |            | X         |
| <b>(2)</b> Other assets   | <b>1a(2)</b> |            | X         |
| <b>b</b> Other transactions:  |              |            |           |
| <b>(1)</b> Sales of assets to a noncharitable exempt organization   | <b>1b(1)</b> |            | X         |
| <b>(2)</b> Purchases of assets from a noncharitable exempt organization   | <b>1b(2)</b> |            | X         |
| <b>(3)</b> Rental of facilities, equipment, or other assets   | <b>1b(3)</b> |            | X         |
| <b>(4)</b> Reimbursement arrangements   | <b>1b(4)</b> |            | X         |
| <b>(5)</b> Loans or loan guarantees   | <b>1b(5)</b> |            | X         |
| <b>(6)</b> Performance of services or membership or fundraising solicitations   | <b>1b(6)</b> |            | X         |
| <b>c</b> Sharing of facilities, equipment, mailing lists, other assets, or paid employees   | <b>1c</b>    |            | X         |
| <b>d</b> If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received. |              |            |           |

[illegible]

- 2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? . . . . . ☐ Yes ☒ No
- b** If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

**Sign Here**  1/28/2015 President

Signature of officer or trustee Date Title

May the IRS discuss this return with the preparer shown below (see instructions)? ☒ Yes ☐ No

<b>Paid Preparer Use Only</b>	Print/Type preparer's name	Preparer's signature	Date	Check <input type="checkbox"/> if self-employed	PTIN P01331083
	Firm's name ▶ BOKF, N.A.			Firm's EIN ▶ 73-0780382	
	Firm's address ▶ P.O. BOX 1620 TULSA, OK 74101-1620			Phone no 918-619-1544	



## FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
-----	-----	-----
INVESCO REAL ESTATE-R5 #4725	1,216.	1,216.
AMERICAN INT'L GROUP INC	315.	315.
ANALOG DEVICES INC COM	1,420.	1,420.
ARTISAN M/C VAL-INST #2450	814.	814.
BANK AMER CORP COM	124.	124.
WM BLAIR INTL GROWTH-I #1747	2,959.	2,959.
CABOT OIL & GAS CORP	88.	88.
CALAMOS MKT NEUTRAL INC-I #0629	538.	538.
CALVERT SHORT DURATION INC-I #0512	1,421.	1,421.
CANADIAN PAC RY LTD COM	454.	454.
CATERPILLAR INC	720.	720.
CITIGROUP INC	5.	5.
CUMMINS INC	688.	688.
DIAMOND HILL LONG/SHORT-I #0011	302.	302.
EQT CORPORATION	60.	60.
EMERSON ELECTRIC CO	613.	613.
FHLB @ 4.500% DUE 02/18/2015	2,250.	2,250.
FEDERATED STRAT VAL DIV-INST #0662	12,433.	12,433.
FEDERATED HI YLD BD-INST #0900	6,761.	6,761.
FIDELITY LEVERAGED CO STOCK FD#0122	424.	424.
GENERAL MOTORS	480.	480.
GOLDMAN SACHS GROUP INC @ 5.750% DUE 10	2,875.	2,875.
HARBOR INTERNATIONAL FUND	4,745.	4,745.
HARMAN INTL INDS INC NEW	720.	720.
ISHARES MSCI EMERGING MARKETS ETF	1,635.	1,635.
ISHARES RUSSELL MID-CAP GROWTH ETF	1,477.	1,477.
ISHARES TR S&P MIDCAP 400/VAL	2,677.	2,677.
ISHARES MSCI EAFE SMALL-CAP ETF	2,841.	2,841.
JOY GLOBAL INC COM	79.	79.
LAZARD EMRG MKTS-INST	2,100.	2,100.
MASTERCARD INC - CLASS A	323.	323.
MERGER FD#0260	1,221.	1,221.
QC4884 9078 01/26/2015 20:22:33	61A059015	



## FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
-----	-----	-----
MSIF GBL REAL EST-INST FD#8004	1,465.	1,465.
ORACLE CORPORATION	132.	132.
PIMCO TOTAL RETURN FUND INST#35	11,846.	11,846.
PHILLIPS 66	876.	876.
PIMCO ALL ASSET-INST FD#0034	7,441.	7,441.
PIONEER NATURAL RESOURCES CO	6.	6.
T ROWE PRICE GROWTH STOCK FUND	55.	55.
STARWOOD HOTELS & RESORTS	1,675.	1,675.
TEMPLETON GLOBAL BOND-ADV #0616	11,772.	11,772.
VANGUARD DEV MKTS INDX- ADM FD#5227	6,121.	6,121.
VANGUARD SHORT TERM BOND IDX ADMIRAL CL	275.	275.
VANGUARD S/T BD INDX-SIG FD#1349	172.	172.
VANGUARD TAX-MANAGED INTL FUND #127	1,815.	1,815.
VANGUARD INFL-PROT SEC-ADM FD#5119	4,026.	4,026.
VANGUARD S/T INVEST GRADE-ADM #0539	1,707.	1,707.
VANGUARD INSTITUTIONAL INDEX	5,219.	5,219.
VANGUARD SMALL CAP VALUE INDEX INST FD	3,261.	3,261.
VANGUARD MID CAP INDX-INST FD#0864	2,255.	2,255.
VANGUARD VALUE INDX-INST FD#0867	4,708.	4,708.
VANGUARD INDEX TR GRTH INDX INSTL	1,682.	1,682.
VANGUARD SM CAP INDX-INST FD#0857	2,258.	2,258.
XL GROUP PLC	280.	280.
CSBT SHORT-TERM CASH FUND I	13.	13.
TOTAL	123,838.	123,838.
	=====	=====

## FORM 990PF, PART I - LEGAL FEES

=====

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE PURPOSES
-----	-----	-----	-----	-----
LEGAL FEES - PRINCIPAL (ALLOCA	283.			283.
	-----	-----	-----	-----
TOTALS	283.	NONE	NONE	283.
	=====	=====	=====	=====

FORM 990PF, PART I - ACCOUNTING FEES  
=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----	ADJUSTED NET INCOME -----	CHARITABLE PURPOSES -----
TAX PREPARATION FEE (NON-ALLOC	2,725.			2,725.
TOTALS	2,725.	NONE	NONE	2,725.

FORM 990PF, PART I - OTHER PROFESSIONAL FEES  
=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----	CHARITABLE PURPOSES -----
BOKF CUSTODIAN FEES	31,530.	31,530.	
PROFESSIONAL FEE	8,129.		8,129.
WOOD INVESTMENT COUNSEL	8,276.	8,276.	
	-----	-----	-----
TOTALS	47,935.	39,806.	8,129.
	=====	=====	=====

## FORM 990PF, PART I - TAXES

=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----	CHARITABLE PURPOSES -----
FOREIGN TAXES	96.	96.	
FEDERAL TAX PAYMENT - PRIOR YE	1,059.		1,059.
FEDERAL ESTIMATES - PRINCIPAL	3,165.		3,165.
FOREIGN TAXES ON QUALIFIED FOR	606.	606.	
FOREIGN TAXES ON NONQUALIFIED	609.	609.	
	-----	-----	-----
TOTALS	5,535.	1,311.	4,224.
	=====	=====	=====

## FORM 990PF, PART I - OTHER EXPENSES

=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----	CHARITABLE PURPOSES -----
COMPUTER EXPENSE	1,201.		1,201.
INSURANCE	2,602.		2,602.
POSTAGE AND DELIVERY	106.		106.
UTILITIES	1,675.		1,675.
SUPPLIES	385.		385.
OTHER	70.		70.
PROPERTY TAXES	226.		226.
CLASS ACTION FEES	100.	100.	
TOTALS	6,365.	100.	6,265.
	=====	=====	=====

J.K. MULLEN FOUNDATION 61A059015

84-6002475

FORM 990PF, PART II - U.S. AND STATE OBLIGATIONS  
=====

DESCRIPTION  
-----

FHLB @ 4.500%

ENDING  
BOOK VALUE  
-----  
ENDING  
FMV  
-----

50,831.

51,203.

50,831.

51,203.

TOTALS

84-6002475

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ENDING  
BOOK VAL.

TOTALS

591,871.	1,036,572.
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STATEMENT 9



J.K. MULLEN FOUNDATION 61A059015

84-6002475

FORM 990PF, PART II - CORPORATE BONDS  
=====

DESCRIPTION  
-----

ENDING  
BOOK VALUE  
-----

ENDING  
FMV  
---

GOLDMAN SACHS GROUP INC

50,000.

54,907.

TOTALS

50,000.

54,907.

J.K. MULLEN FOUNDATION 61A059015

84-6002475

FORM 990PF, PART II - OTHER INVESTMENTS  
=====

DESCRIPTION	COST/ FMV C OR F	ENDING BOOK VALUE	ENDING FMV
-----	-----	-----	---
CALVERT SHORT DURATION INC-I	F	95,011.	94,676.
FEDERATED HI YLD BD - INST	C	114,991.	116,698.
PIMCO TOTAL RETURN-INST	C	473,726.	501,579.
TEMPLETON GLOBAL BOND-ADV	C	262,746.	274,305.
VANGUARD S/T BD INDX-ADM	C	91,945.	91,797.
VANGUARD INFL-PROT SEC-ADM	C	156,543.	164,239.
ARTISAN M/C VAL INST	C	49,465.	78,641.
WM BLAIR INTL GROWTH-I	C	122,108.	220,891.
FEDERATED STRAT VAL DIV-INST	C	191,000.	251,054.
HARBOR INTERNATIONAL-INST	C	176,856.	220,915.
LAZAARD EMRG MKTS-INST	C	85,967.	109,224.
T ROWE PRICE GWTH STK-I	C	75,722.	148,658.
VANGUARD DEV MKTS INDX-ADM	C	96,141.	146,943.
VANGUARD INSTL INDX-INST	C	278,782.	356,973.
VANGUARD SM CP VAL INDX-INST F	C	52,971.	143,294.
VANGUARD MID CAP INDX FD#0864	C	50,823.	139,811.
VANGUARD VALUE INDX-INST	C	139,678.	221,306.
VANGUARD GRWTH INDX	C	64,882.	138,361.
VANGUARD SM CAP INDX	C	47,825.	147,800.
ISHARES MSCI EMERGING MARKETS	C	65,154.	96,404.
ISHARES RUSSEL MID-CAP GROWTH	C	36,449.	103,090.
ISHARES S&P MIDCAP 400/VALUE	C	77,526.	174,643.
ISHARES MSCI EAFE SMALL-CAP ET	C	81,674.	116,156.
CALAMOS MKT NEUTRAL INC-I	C	38,826.	43,195.
CREDIT SUISSE COMM RET ST-INST	C	34,980.	22,145.
DIAMOND HILL LONG/SHORT-I	C	62,221.	89,984.
FIDELITY LEVERAGE CO STOCK	C	23,915.	45,487.
MERGER	C	49,803.	51,257.
PIMCO ALL ASSET-INST	C	167,000.	169,036.

FORM 990PF, PART II - OTHER INVESTMENTS  
=====

DESCRIPTION -----	COST/ FMV C OR F -----	ENDING BOOK VALUE -----	ENDING FMV ---
INVESCO REAL ESTATE	C	48,186.	59,136.
MSIF GLBL REAL EST	C	55,768.	60,882.
VANGUARD S/T INVEST GRADE	C	52,005.	52,014.
		-----	-----
TOTALS		3,420,689.	4,650,594.
		=====	=====

## LAND, BUILDINGS, EQUIPMENT NOT HELD FOR INVESTMENT

=====

			FIXED ASSET DETAIL			ACCUMULATED DEPRECIATION DETAIL			
ASSET DESCRIPTION	METHOD/ CLASS	BEGINNING BALANCE	ADDITIONS	DISPOSALS	ENDING BALANCE	BEGINNING BALANCE	ADDITIONS	DISPOSALS	ENDING BALANCE
COMPUTER	M5	1,325.			1,325.	132	265.		397.
FURNITURE	M5	1,341.			1,341.	68.	268		336.
FURNITURE	M5		832.		832.		166		166.
OFFICE FURN & EQUIO	M5	6,483.			6,483.	6,483.			6,483.
TOTALS		9,149			9,981	6,683.			7,382
		=====			=====	=====			=====

FORM 990PF, PART VII-A, LINE 14 - BOOKS ARE IN THE CARE OF  
=====

NAME: TIMOTHY O'CONNOR

ADDRESS: 5310 DTC PARKWAY SUITE C  
GREENWOOD VILLAGE, CO 80111

TELEPHONE NUMBER: (303)722-3557

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES  
=====

## OFFICER NAME:

JOHN F. MALO

## ADDRESS:

2020 S. MONROE ST 703  
DENVER, CO 80210

## TITLE:

TRUSTEE

AVERAGE HOURS PER WEEK DEVOTED TO POSITION: 10

COMPENSATION ..... 500.

## OFFICER NAME:

JOHN WECKBUAGH

## ADDRESS:

4021 HUDSON WAY  
ENGLEWOOD, CO 80110

## TITLE:

VICE PRESIDENT/TRUSTEE

AVERAGE HOURS PER WEEK DEVOTED TO POSITION: 5

COMPENSATION ..... 500.

## OFFICER NAME:

WALTER WECKBAUGH

## ADDRESS:

2364 E WEATHERSTONE CIRCLE  
HIGHLANDS RANCH, CO 80126

## TITLE:

TREASURER/TRUSTEE

AVERAGE HOURS PER WEEK DEVOTED TO POSITION: 5

COMPENSATION ..... 500.

## OFFICER NAME:

TIMOTHY O'CONNOR

## ADDRESS:

7159 S. POPLAR LANE  
CENTENNIAL, CO 80126

## TITLE:

PRESIDENT/TRUSTEE

AVERAGE HOURS PER WEEK DEVOTED TO POSITION: 10

COMPENSATION ..... 13,026.

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES  
=====

## OFFICER NAME:

J. KENNETH MALO JR

## ADDRESS:

39 DAHLIA ST  
DENVER, CO 80220

## TITLE:

TRUSTEE

AVERAGE HOURS PER WEEK DEVOTED TO POSITION: 5

COMPENSATION ..... 500.

## OFFICER NAME:

SHEILA SEVIER

## ADDRESS:

3955 S. UINTA ST  
DENVER, CO 80237

## TITLE:

SECRETARY/TRUSTEE

AVERAGE HOURS PER WEEK DEVOTED TO POSITION: 5

COMPENSATION ..... 500.

## OFFICER NAME:

MARCUS SEIVER

## ADDRESS:

6117 W. 38TH AVE  
WHEAT RIDGE, CO 80033

## TITLE:

TRUSTEE

AVERAGE HOURS PER WEEK DEVOTED TO POSITION: 5

COMPENSATION ..... 500.

## OFFICER NAME:

KATHLEEN MALO

## ADDRESS:

835 AGUSTA DR  
MORAGA, CA 94556

## TITLE:

TRUSTEE

AVERAGE HOURS PER WEEK DEVOTED TO POSITION: 5

COMPENSATION ..... 500.

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES  
=====

OFFICER NAME:

HEATHER WHITMAN

ADDRESS:

2231 S. EMERSON ST

DENVER, CO 80210

TITLE:

TRUSTEE

AVERAGE HOURS PER WEEK DEVOTED TO POSITION: 5

COMPENSATION ..... 500.

TOTAL COMPENSATION: 17,026.  
=====



J.K. MULLEN FOUNDATION 61A059015  
FORM 990PF, PART XV - LINES 2a - 2d  
=====

84-6002475

RECIPIENT NAME:

JK MULLEN FOUNDATION

ADDRESS:

5310 DTC PARKWAY SUITE

GREENWOOD VILLAGE, CO 80111

FORM, INFORMATION AND MATERIALS:

COMMON GRANT APPLICATION FORM OR LETTER STATING DATE AND BRIEF HISTORY  
OF THE ORG, AMT AND PURPOSE OF REQUEST, CURRENT FINANCIAL STATEMENTS

SUBMISSION DEADLINES:

APPLICATIONS FOR GRANTS ARE ACCEPTED ANYTIME PRIOR TO JUNE 1ST  
OF THE CURRENT YEAR

RESTRICTIONS OR LIMITATIONS ON AWARDS:

NO GRANTS ARE CONSIDERED TO INDIVIDUALS OR ORGANIZATIONS THAT DO NOT  
HAVE A FEDERALLY APPROVED TAX EXEMPT STATUS

STATEMENT 18

=====

## RECIPIENT NAME:

ACE SCHOLARSHIPS

## ADDRESS:

1201 EAST COLFAX AVENUE SUITE 302

DENVER, CO 80218

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 2,000.

## RECIPIENT NAME:

BRAIN INJURY ALLIANCE

## ADDRESS:

4200 W. CONEJOS PL. #524

DENVER, CO 80204

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 1,000.

## RECIPIENT NAME:

GATEWAY BATTERED WOMEN'S SHELTER

## ADDRESS:

P.O. BOX 914

AURORA, CO 80040

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 2,500.

## RECIPIENT NAME:

SAINT JOSEPH CATHOLIC CHURCH  
AND SCHOOL

## ADDRESS:

101 NORTH HOWES ST  
FORT COLLINS, CO 80521

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 2,000.

## RECIPIENT NAME:

SAMARITAN HOUSE

## ADDRESS:

4045 PECOS STREET  
DENVER, CO 80205

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 5,000.

## RECIPIENT NAME:

ST. DOMINIC'S PARISH

## ADDRESS:

3053 W. 29TH AVENUE  
DENVER, CO 80211

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 2,000.

## RECIPIENT NAME:

GRALAND SCHOOL

## ADDRESS:

30 BIRCH STREET

DENVER, CO 80220

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 750.

## RECIPIENT NAME:

GEORGE WASHINGTON UNIVERSITY

PHILLIPS HALL

## ADDRESS:

801 22ND ST N.W.

WASHINGTON, DC 20052

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 1,000.

## RECIPIENT NAME:

ARRUPE JESUIT HIGH SCHOOL

## ADDRESS:

4343 UTICA STREET

DENVER, CO 80212

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 2,500.

FORM 990PF, PART XV, LINE 3a - CONTRIBUTIONS, GIFTS, GRANTS PAID

## RECIPIENT NAME:

RAYMOND WENTZ FOUNDATION

## ADDRESS:

P.O. BOX 9039

DENVER, CO 80209

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 2,000.

## RECIPIENT NAME:

MOUNTAIN HOPE FOUNDATION

## ADDRESS:

86 GOLD RUN HILL

BRECKENRIDGE, CO 80424

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 250.

## RECIPIENT NAME:

ESCUELA DE GUADALUPE

## ADDRESS:

3401 PECOS ST.

DENVER, CO 80211

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 5,000.

=====

## RECIPIENT NAME:

ENGLISH SPRINGER RESCUE AMERICA

## ADDRESS:

33291 GREENWOOD DRIVE

LAKE ELSINORE, CA 92530

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 500.

## RECIPIENT NAME:

FOOTHILLS ANIMAL FOUNDATION

## ADDRESS:

580 MCINTYRE STREET

GOLDEN, CO 80401

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 2,000.

## RECIPIENT NAME:

CREIGHTON UNIVERSITY

## ADDRESS:

P.O. BOX 30282

OMAHA, NE 68103

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 1,000.

=====

## RECIPIENT NAME:

NATIONAL TRUST FOR HISTORIC  
PRESERVATION

## ADDRESS:

1420 OGDEN STREET #201  
DENVER, CO 80236

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 1,500.

## RECIPIENT NAME:

LOYOLA UNIVERSITY

## ADDRESS:

6363 ST. CHARLES AVENUE CAMPUS 205  
NEW ORLEANS, LA 70118

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 1,000.

## RECIPIENT NAME:

STEP 13

## ADDRESS:

2029 LARIMER STREET  
DENVER, CO 80205

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 3,000.

=====

## RECIPIENT NAME:

ADAM'S CAMP

## ADDRESS:

6767 S. SPRUCE ST. SUITE 102

CENTENNIAL, CO 80112

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 1,000.

## RECIPIENT NAME:

COLORADO DOMINICAN VOCATION

FOUNDATION

## ADDRESS:

3005 W. 29TH AVENUE

DENVER, CO 80211

## RELATIONSHIP:

PUBLIC

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 4,000.

## RECIPIENT NAME:

REGIS UNIVERSITY

## ADDRESS:

3333REGIS BOULEVARD B-16

DENVER, CO 80221

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 10,000.



FORM 990PF, PART XV, LINE 3a - CONTRIBUTIONS, GIFTS, GRANTS PAID

## RECIPIENT NAME:

DUMB FRIENDS LEAGUE

## ADDRESS:

2080 SOUTH QUEBEC ST.

DENVER, CO 80231

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 5,500.

## RECIPIENT NAME:

SEWELL CHILD DEVELOPMENT CENTER

## ADDRESS:

1360 VINE STREET

DENVER, CO 80206

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 2,000.

## RECIPIENT NAME:

COLORADO ACADEMY

## ADDRESS:

3800 SOUTH PIERCE STREET

DENVER, CO 80235

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 750.

## RECIPIENT NAME:

JUNIOR ACHIEVEMENT OF ROCKY  
MOUNTAIN, INC

## ADDRESS:

1445 MARKET ST 200  
DENVER, CO 80202

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 2,500.

## RECIPIENT NAME:

LITTLE SISTERS OF THE POOR

## ADDRESS:

36209 WEST 39TH AVE  
DENVER, CO 80211

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 10,000.

## RECIPIENT NAME:

HAVERN CENTER

## ADDRESS:

4000 SOUTH WADSWORTH BLVD  
LITTLETON, CO 80123

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 20,450.

## RECIPIENT NAME:

SISTERS OF LORETTO

## ADDRESS:

4000 S. WADSWORTH BLVD

LITTLETON, CO 80123

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 2,000.

## RECIPIENT NAME:

BAYAUD INDUSTRIES

## ADDRESS:

333 WEST BAYAUD AVE

DENVER, OH 80223

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 7,500.

## RECIPIENT NAME:

CHILDREN'S MUSEUM

## ADDRESS:

2121 CHILDREN'S MUSEUM DRIVE

DENVER, CO 80211

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 2,800.

=====

## RECIPIENT NAME:

DENVER ACADEMY

## ADDRESS:

4400 EAST ILIFF AVE

DENVER, CO 80222

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 34,000.

## RECIPIENT NAME:

CATHOLIC CHARITIES

## ADDRESS:

4045 E PECOS STREET

DENVER, CO 80211

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 1,250.

## RECIPIENT NAME:

DENVER HOSPICE

## ADDRESS:

501 S. CHERRY ST

DENVER, CO 80246

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 2,500.

## RECIPIENT NAME:

SAFEHOUSE DENVER

## ADDRESS:

1649 DOWNING STREET

DENVER, CO 80218

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 2,500.

## RECIPIENT NAME:

REGIS JESUIT HIGH SCHOOL

## ADDRESS:

6300 S. LEWISTON WAY

AURORA, CO 80016

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 7,000.

## RECIPIENT NAME:

ROCKY MOUNTAIN MULTIPLE

SCLEROSIS CENTER

## ADDRESS:

8845 WAGNER STREET

WESTMINSTER, CO 80031

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 7,360.

FORM 990PF, PART XV, LINE 3a - CONTRIBUTIONS, GIFTS, GRANTS PAID

## RECIPIENT NAME:

HOME HEALTH CARE PROFESSIONALS INC

## ADDRESS:

3680 S. GALAPAGO STREET STE 102

ENGLEWOOD, CO 80110

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 2,000.

## RECIPIENT NAME:

COLORADO THERAPEUTIC RIDING CENTER

## ADDRESS:

11968 MINERAL RD

LONGMONT, CO 80504

## RELATIONSHIP:

PUBLIC

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 5,500.

## RECIPIENT NAME:

MI CASA RESOURCE CENTER

## ADDRESS:

360 ACOMA ST

DENVER, CO 80223

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 2,500.

=====

## RECIPIENT NAME:

SENIORS RESOURCE CENTER

## ADDRESS:

3227 CHASE ST

WHEAT RIDGE, CO 80212

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 2,000.

## RECIPIENT NAME:

SACRED HEART HOUSE OF DENVER

## ADDRESS:

2844 LAWRENCE STREET

DENVER, CO 80205

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 5,000.

## RECIPIENT NAME:

COLORADO COALITION FOR THE HOMELESS

## ADDRESS:

2111 CHAMPA STREET

DENVER, CO 80205

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 500.

## RECIPIENT NAME:

FREEDOM SERVICE DOGS INC.

## ADDRESS:

2000 WEST UNION AVE  
ENGLEWOOD, CO 80110

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 1,000.

## RECIPIENT NAME:

WOMENS BEAN PROJECT

## ADDRESS:

3201 CURTIS ST  
DENVER, CO 80205

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 2,500.

## RECIPIENT NAME:

BOYS HOPE

## ADDRESS:

7060 E. HAMPDEN AVENUE SUITE 203  
DENVER, CO 80224

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 1,000.



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## RECIPIENT NAME:

VAIL JAZZ YOUTH

## ADDRESS:

P.O. BOX 3035

VAIL, CO 81658

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 250.

## RECIPIENT NAME:

FATHER WOODY'S HAVEN OF HOPE

## ADDRESS:

1101 WEST 7TH AVE

DENVER, CO 80204

## RELATIONSHIP:

PUBLIC

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 1,500.

## RECIPIENT NAME:

ADAPTIVE ADVENTURES

## ADDRESS:

4840 PEARL EAST CIRCLE #201 W

BOULDER, CO 80301

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 2,600.

FORM 990PF, PART XV, LINE 3a - CONTRIBUTIONS, GIFTS, GRANTS PAID

## RECIPIENT NAME:

CENTRAL CITY OPERA

## ADDRESS:

400 S. COLORADO BLVD

DENVER, CO 80246

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 1,000.

## RECIPIENT NAME:

MULLEN HIGH SCHOOL

## ADDRESS:

3601 S. LOWELL BLVD

DENVER, CO 80236

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 37,990.

## RECIPIENT NAME:

DENVER RESCUE MISSION

## ADDRESS:

PO BOX 5206

DENVER, CO 80217

## RELATIONSHIP:

NOT APPLICABLE

## PURPOSE OF GRANT:

GENERAL PUBLIC SUPPORT

## FOUNDATION STATUS OF RECIPIENT:

PUBLIC

AMOUNT OF GRANT PAID ..... 2,500.

TOTAL GRANTS PAID:

225,950.

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84-6002475

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## Schedule D Detail of Long-term Capital Gains and Losses

Description	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Long-term Gain/Loss
PUBLICLY TRADED SECURITIES					
773.395 ARTISAN M/C VAL-INST #2450	11/30/2009	08/07/2013	20,000.00	13,339.00	6,661.00
250. ISHARES TR S&P MIDCAP 400/VAL	08/04/2006	08/07/2013	26,925.00	18,280.00	8,645.00
1635.514 VANGUARD SMALL CAP VALUE INDEX INST FD	04/06/2009	08/07/2013	35,000.00	14,736.00	20,264.00
521.921 VANGUARD SM CAP INDX-INST	03/22/2012	08/07/2013	25,000.00	11,154.00	13,846.00
150. JOY GLOBAL INC COM	06/19/2012	08/30/2013	7,339.00	8,717.00	-1,378.00
399.84 INVESCO REAL ESTATE-R5 #4725	08/01/2012	09/27/2013	10,000.00	10,476.00	-476.00
756.144 ARTISAN M/C VAL-INST #2450	11/30/2009	09/27/2013	20,000.00	13,041.00	6,959.00
125.031 FIDELITY LEVERAGED CO STOCK	10/01/2010	09/27/2013	5,000.00	3,012.00	1,988.00
350. ISHARES RUSSELL MID-CAP GROWTH	12/17/2003	09/27/2013	27,380.00	12,381.00	14,999.00
2323.78 TEMPLETON GLOBAL BOND-ADV	10/01/2010	09/27/2013	30,000.00	31,836.00	-1,836.00
538. INVESCO REAL ESTATE-R5 #4725	08/01/2012	10/22/2013	14,139.00	14,096.00	43.00
96. FIDELITY LEVERAGED CO STOCK	10/01/2010	10/22/2013	4,010.00	2,313.00	1,697.00
150. ISHARES RUSSELL MID-CAP GROWTH	12/17/2003	10/22/2013	12,090.00	5,306.00	6,784.00
100. ISHARES TR S&P MIDCAP 400/VAL	08/04/2006	10/22/2013	11,301.00	7,312.00	3,989.00
300. ISHARES MSCI EAFE SMALL-CAP ETF	11/23/2009	10/22/2013	15,225.00	10,994.00	4,231.00
445. VANGUARD SMALL CAP VALUE INDEX INST FD	04/06/2009	10/22/2013	10,061.00	3,971.00	6,090.00
466. VANGUARD MID CAP INDX-INST FD#0864	04/25/2001	10/22/2013	13,570.00	5,366.00	8,204.00
197. VANGUARD SM CAP INDX-INST FD#0857	12/30/2008	10/22/2013	10,059.00	3,891.00	6,168.00
184. ARTISAN M/C VAL-INST #2450	11/30/2009	11/04/2013	5,029.00	3,173.00	1,856.00
180. ISHARES RUSSELL MID-CAP GROWTH	04/03/2009	11/04/2013	14,531.00	5,962.00	8,569.00
4140. PIMCO TOTAL RETURN FUND INST#35	07/06/2012	11/04/2013	45,043.00	45,464.00	-421.00
99. VANGUARD SM CAP INDX-INST	12/30/2008	11/04/2013	5,063.00	1,928.00	3,135.00
130.579 FIDELITY LEVERAGED CO STOCK	10/01/2010	02/07/2014	5,500.00	3,146.00	2,354.00
3683.241 PIMCO TOTAL RETURN FUND INST#35	12/12/2012	02/07/2014	40,000.00	39,491.00	509.00
1948.558 TEMPLETON GLOBAL BOND-ADV #0616	07/06/2012	02/07/2014	25,000.00	25,095.00	-95.00
664.305 VANGUARD SMALL CAP VALUE INDEX Totals INST FD					

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## Schedule D Detail of Long-term Capital Gains and Losses

Description	Date 08/01/2012	Date Sold	Gross Sales Price	Cost or Other Basis	Long-term Gain/Loss
843.739 VANGUARD MID CAP INDX-INST	04/25/2001	02/07/2014	15,000.00	5,926.00	9,074.00
300. CANADIAN PAC RY LTD COM	03/21/2012	02/07/2014	25,000.00	9,716.00	15,284.00
297. INVESCO REAL ESTATE-R5 #4725	08/01/2012	03/06/2014	47,554.00	23,687.00	23,867.00
170. FIDELITY LEVERAGED CO STOCK		04/02/2014	6,985.00	7,781.00	-796.00
FD#0122	10/01/2010	04/02/2014	7,579.00	4,095.00	3,484.00
350. ISHARES RUSSELL MID-CAP GROWTH	04/03/2009	04/02/2014	30,498.00	11,290.00	19,208.00
828. MSIF GLBL REAL EST-INST					
FD#8004	03/26/2013	04/02/2014	8,553.00	8,396.00	157.00
4643. PIMCO TOTAL RETURN FUND INST#35	03/01/2000	04/02/2014	49,912.00	47,940.00	1,972.00
615. VANGUARD SMALL CAP VALUE INDEX					
INST FD	08/15/2002	04/02/2014	15,080.00	5,486.00	9,594.00
638. VANGUARD MID CAP INDX-INST					
FD#0864	04/25/2001	04/02/2014	20,084.00	7,347.00	12,737.00
366. VANGUARD SM CAP INDX-INST					
FD#0857	03/20/2013	04/02/2014	20,101.00	8,394.00	11,707.00
230. ISHARES RUSSELL MID-CAP GROWTH	04/03/2009	05/20/2014	19,386.00	7,419.00	11,967.00
1373. PIMCO TOTAL RETURN FUND INST#35	03/01/2000	05/20/2014	15,021.00	14,177.00	844.00
1858.736 VANGUARD S/T INVEST GRADE-ADM					
#0539	03/19/2013	07/01/2014	20,000.00	20,130.00	-130.00
130. CANADIAN PAC RY LTD COM	06/19/2012	07/24/2014	25,595.00	10,102.00	15,493.00
70. CANADIAN PAC RY LTD COM	06/19/2012	07/25/2014	13,648.00	5,148.00	8,500.00
235.942 INVESCO REAL ESTATE-R5 #4725	08/01/2012	07/29/2014	6,000.00	4,961.00	1,039.00
139.875 FIDELITY LEVERAGED CO STOCK	10/01/2010	07/29/2014	6,500.00	3,370.00	3,130.00
580.876 MSIF GLBL REAL EST-INST	03/26/2013	07/29/2014	6,500.00	5,890.00	610.00
203.252 VANGUARD SMALL CAP VALUE INDEX					
INST FD	08/15/2002	07/29/2014	5,000.00	1,813.00	3,187.00
465.116 VANGUARD MID CAP INDX-INST	04/25/2001	07/29/2014	15,000.00	5,356.00	9,644.00
183.79 VANGUARD SM CAP INDX-INST					
FD#0857	04/06/2009	07/29/2014	10,000.00	3,459.00	6,541.00
TOTAL PUBLICLY TRADED SECURITIES			826,261.00	536,363.00	289,898.00
<b>Totals</b>			826,261.00	536,363.00	289,898.00

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## FEDERAL CAPITAL GAIN DISTRIBUTIONS

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## LONG-TERM CAPITAL GAIN DISTRIBUTIONS

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## 15% RATE CAPITAL GAIN DISTRIBUTIONS

INVESCO REAL ESTATE-R5 #4725	8,104.00
ARTISAN M/C VAL-INST #2450	2,798.00
CALAMOS MKT NEUTRAL INC-I #0629	862.00
FEDERATED STRAT VAL DIV-INST #0662	1,148.00
FEDERATED HI YLD BD-INST #0900	177.00
LAZARD EMRG MKTS-INST FD#0638	1,728.00
PIMCO TOTAL RETURN FUND INST#35	3,321.00
TEMPLETON GLOBAL BOND-ADV #0616	70.00
VANGUARD S/T BD INDX-SIG FD#1349	11.00
VANGUARD S/T INVEST GRADE-ADM #0539	207.00
MISC CLASS ACTION PROCEEDS	338.00

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TOTAL 15% RATE CAPITAL GAIN DISTRIBUTIONS

18,763.00

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TOTAL LONG-TERM CAPITAL GAIN DISTRIBUTIONS

18,763.00

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# Application for Extension of Time To File an Exempt Organization Return

OMB No. 1545-1709

► File a separate application for each return.  
► Information about Form 8868 and its instructions is at [www.irs.gov/form8868](http://www.irs.gov/form8868).

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

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

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

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

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

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

Type or print	Name of exempt organization or other filer, see instructions.	Employer identification number (EIN) or
File by the due date for filing your return. See instructions.	J.K. MULLEN FOUNDATION 61A059015	84-6002475
	Number, street, and room or suite no. If a P.O. box, see instructions.	Social security number (SSN)
	5310 DTC PARKWAY SUITE C	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions.	
	GREENWOOD VILLAGE, CO 80111	

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

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

- The books are in the care of ► TIMOTHY O'CONNOR

Telephone No. ► (303) 722-3557

FAX No. ►

- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN)         . If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until 03/16, 20 15, to file the exempt organization return for the organization named above. The extension is for the organization's return for  
► ☐ calendar year 20          or  
► ☒ tax year beginning 08/01, 2013, and ending 07/31, 20 14.

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

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a \$	7,170.
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b \$	3,165.
c <b>Balance due.</b> Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c \$	5,500.

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

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

Form **8868** (Rev. 1-2014)