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Form **990-PF**

Return of Private Foundation

or Section 4947(a)(1) Trust Treated as Private Foundation

OMB No 1545-0052

2013Department of the Treasury
Internal Revenue Service

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Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf.

Open to Public Inspection

For calendar year 2013 or tax year beginning 9/1/2013, and ending 8/31/2014

Name of foundation EMMA ECCLES JONES FOUNDATION			A Employer identification number 87-6155073	
Number and street (or P O box number if mail is not delivered to street address) Wells Fargo Bank N A Trust Tax Dept - PO Box 53456 MAC S4101-22G		Room/suite	B Telephone number (see instructions) (888) 730-4933	
City or town Phoenix	State AZ	ZIP code 85072-3456		
Foreign country name	Foreign province/state/county	Foreign postal code	C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ Name change			D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation			E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 122,382,844		J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____		
			F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)				
	2 Check ☒ if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	203,743	203,743		
	4 Dividends and interest from securities	2,193,643	2,193,643		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	1,875,419			
	b Gross sales price for all assets on line 6a	10,786,564			
	7 Capital gain net income (from Part IV, line 2)		1,875,419		
	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)	93,119	93,119			
12 Total. Add lines 1 through 11	4,365,924	4,365,924	0		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	193,261	126,946		66,315
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)	31,712			31,712
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	95,008	17,008		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	458,871	458,871		
	24 Total operating and administrative expenses. Add lines 13 through 23	778,852	602,825	0	98,027
	25 Contributions, gifts, grants paid	5,497,000			5,497,000
26 Total expenses and disbursements. Add lines 24 and 25	6,275,852	602,825	0	5,595,027	
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements	-1,909,928				
b Net investment income (if negative, enter -0-)		3,763,099			
c Adjusted net income (if negative, enter -0-)			0		

For Paperwork Reduction Act Notice, see instructions.

Form 990-PF (2013)

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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					
	2 Savings and temporary cash investments	2,939,418	1,069,405	1,069,405		
	3 Accounts receivable ▶					
	Less allowance for doubtful accounts ▶					
	4 Pledges receivable ▶					
	Less allowance for doubtful accounts ▶					
	5 Grants receivable					
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)					
	7 Other notes and loans receivable (attach schedule) ▶					
	Less allowance for doubtful accounts ▶					
	8 Inventories for sale or use					
	9 Prepaid expenses and deferred charges					
	10a Investments—U S and state government obligations (attach schedule)					
	b Investments—corporate stock (attach schedule)					
	c Investments—corporate bonds (attach schedule)					
	11 Investments—land, buildings, and equipment basis ▶					
	Less accumulated depreciation (attach schedule) ▶					
	12 Investments—mortgage loans					
	13 Investments—other (attach schedule)	69,085,735	70,283,114	121,313,439		
	14 Land, buildings, and equipment basis ▶					
	Less accumulated depreciation (attach schedule) ▶					
	15 Other assets (describe ▶)					
	16 Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	72,025,153	71,352,519	122,382,844		
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)	0	0			
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. ☐					
	24 Unrestricted					
	25 Temporarily restricted					
	26 Permanently restricted					
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ☒					
	27 Capital stock, trust principal, or current funds	72,025,153	71,352,519			
	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)	72,025,153	71,352,519			
	31 Total liabilities and net assets/fund balances (see instructions)	72,025,153	71,352,519			

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	72,025,153
2 Enter amount from Part I, line 27a	2	-1,909,928
3 Other increases not included in line 2 (itemize) ▶ See Attached Statement	3	1,876,454
4 Add lines 1, 2, and 3	4	71,991,679
5 Decreases not included in line 2 (itemize) ▶ PARTNERSHIP INCOME ADJUSTMENT	5	639,160
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	71,352,519

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs. MLC Co.)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a See Attached Statement				
b See Attached Statement				
c See Attached Statement				
d See Attached Statement				
e See Attached Statement				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a			0	
b			0	
c			0	
d			0	
e			0	
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any		
a			0	
b			0	
c			0	
d			0	
e			0	
2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }			2	1,875,419
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8 }			3	0

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.

(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	4,112,363	90,777,218	0.045302
2011	4,248,627	83,870,785	0.050657
2010	4,836,243	86,168,245	0.056126
2009	3,514,229	78,567,115	0.044729
2008	5,497,180	70,900,438	0.077534
2 Total of line 1, column (d)			2 0.274348
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years			3 0.054870
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5			4 107,593,453
5 Multiply line 4 by line 3			5 5,903,653
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 37,631
7 Add lines 5 and 6			7 5,941,284
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions			8 5,595,027

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)			
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b	1	75,262	
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0	
3	Add lines 1 and 2	3	75,262	
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4		
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	75,262	
6	Credits/Payments			
a	2013 estimated tax payments and 2012 overpayment credited to 2013	6a	72,835	
b	Exempt foreign organizations—tax withheld at source	6b		
c	Tax paid with application for extension of time to file (Form 8868)	6c	45,000	
d	Backup withholding erroneously withheld	6d		
7	Total credits and payments. Add lines 6a through 6d	7	117,835	
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8		
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	0	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	42,573	
11	Enter the amount of line 10 to be Credited to 2014 estimated tax Refunded	11	0	

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)? <i>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</i>		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation \$ _____ (2) On foundation managers \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities</i>		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>		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?	N/A	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T</i>		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i>	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) UT		
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 <i>General Instruction G</i> ? <i>If "No," attach explanation</i>		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)? <i>If "Yes," complete Part XIV</i>		X
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>		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? Website address ► N/A	13	X	
14	The books are in care of ► WELLS FARGO BANK N A Telephone no ► 888-730-4933 Located at ► PO Box 53456 MAC S4101-22G Phoenix AZ ZIP+4 ► 85072-3456			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041—Check here and enter the amount of tax-exempt interest received or accrued during the year ► 15 N/A			
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes," enter the name of the foreign country ►	16	Yes	No
				X

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

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

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

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))? (2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? (3) Provide a grant to an individual for travel, study, or other similar purposes? (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) (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 ☐ Yes ☒ No ☐ Yes ☒ No ☐ Yes ☒ No ☐ Yes ☒ No	5b 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)? Organizations relying on a current notice regarding disaster assistance check here ▶ ☐ c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? N/A ☐ Yes ☐ No If "Yes," attach the statement required by Regulations section 53.4945–5(d)	6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? 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?	5b N/A 6b X 7b N/A
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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 Attached Statement	00	0		
	00	0		
	00	0		
	00	0		
	00	0		

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

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

Total number of other employees paid over \$50,000 ▶ 0

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

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

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 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	▶ 0

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities	1a	108,234,210
b	Average of monthly cash balances	1b	997,722
c	Fair market value of all other assets (see instructions)	1c	
d	Total (add lines 1a, b, and c)	1d	109,231,932
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	109,231,932
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see instructions)	4	1,638,479
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	107,593,453
6	Minimum investment return. Enter 5% of line 5	6	5,379,673

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6	1	5,379,673
2a	Tax on investment income for 2013 from Part VI, line 5	2a	75,262
b	Income tax for 2013 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	75,262
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	5,304,411
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	5,304,411
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	5,304,411

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26	1a	5,595,027
b	Program-related investments—total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	5,595,027
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions)	5	
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	5,595,027

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

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2012	(c) 2012	(d) 2013
1 Distributable amount for 2013 from Part XI, line 7				5,304,411
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only			3,604,744	
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2013				
a From 2008				
b From 2009				
c From 2010				
d From 2011				
e From 2012				
f Total of lines 3a through e	0			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 5,595,027				
a Applied to 2012, but not more than line 2a			3,604,744	
b Applied to undistributed income of prior years (Election required—see instructions)				
c Treated as distributions out of corpus (Election required—see instructions)				
d Applied to 2013 distributable amount				1,990,283
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:	0			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0			
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				
d Subtract line 6c from line 6b Taxable amount—see instructions				
e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014				3,314,128
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)				
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions)				
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9				
a Excess from 2009				
b Excess from 2010				
c Excess from 2011				
d Excess from 2012				
e Excess from 2013				

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

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

b Check box to indicate whether the foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			(e) Total
	(a) 2013	(b) 2012	(c) 2011	(d) 2010	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					0
b 85% of line 2a					0
c Qualifying distributions from Part XII, line 4 for each year listed					0
d Amounts included in line 2c not used directly for active conduct of exempt activities					0
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					0
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test—enter					
(1) Value of all assets					0
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					0
b "Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					0
c "Support" alternative test—enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					0
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					0
(3) Largest amount of support from an exempt organization					0
(4) Gross investment income					0

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year—see instructions.)**1 Information Regarding Foundation Managers:**

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

NONE

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

NONE

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

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

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

CLARK GILES PO BOX 45385 SALT LAKE CITY, UT 84145

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

N/A

- c** Any submission deadlines

N/A

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

NO GRANTS ANTICIPATE BEING MADE INCIDENT TO UNSOLICITED REQUESTS FOR NEXT FIVE YEARS

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i> See Attached Statement				
Total			3a	5,497,000
b <i>Approved for future payment</i> NONE				
Total			3b	0

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1	Program service revenue					
a						
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			14	203,743	
4	Dividends and interest from securities			14	2,193,643	
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	1,875,419	
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory					
11	Other revenue a <u>INCOME FROM PARTNERSH</u>			01	159,680	
b	<u>UBTI INCOME</u>	900001	-66,561			
c						
d						
e						
12	Subtotal Add columns (b), (d), and (e)		-66,561		4,432,485	0
13	Total. Add line 12, columns (b), (d), and (e)					4,365,924

(See worksheet in line 13 instructions to verify calculations)

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

[illegible]

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

- 1** 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?
- a** Transfers from the reporting foundation to a noncharitable exempt organization of
- (1) Cash
- (2) Other assets
- b** Other transactions
- (1) Sales of assets to a noncharitable exempt organization
- (2) Purchases of assets from a noncharitable exempt organization
- (3) Rental of facilities, equipment, or other assets
- (4) Reimbursement arrangements
- (5) Loans or loan guarantees
- (6) Performance of services or membership or fundraising solicitations
- c** Sharing of facilities, equipment, mailing lists, other assets, or paid employees
- d** 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.

	Yes	No
1a(1)		X
1a(2)		X
1b(1)		X
1b(2)		X
1b(3)		X
1b(4)		X
1b(5)		X
1b(6)		X
1c		X

[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

**Sign
Here**

John A. Senter SVP Wells Fargo Bank N.A.
Signature of officer or trustee

6/25/2015
Date

SVP Wells Fargo Bank N A
Title

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

**Paid
Preparer
Use Only**

Print/Type preparer's name
JOSEPH J CASTRIANO

Preparer's signature 

Date	6/25/2015
------	-----------

Firm's name	► PricewaterhouseCoopers, LLP
Firm's address	► 600 GRANT STREET, PITTSBURGH, PA 15219-2777

Firm's EIN ▶	13-4008324
Phone no	412-355-6000

Continuation of Part XV, Line 3a (990-PF) - Grants and Contributions Paid During the Year

Recipient(s) paid during the year

Name

LANTERN HOUSE ST ANNE'S CENTER

Street

137 W BINFORD ST

City

OGDEN

State

UT

Zip Code

84401

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL SUPPORT GRANT

Amount

150,000

Name

AMERICAN CANCER SOCIETY

Street

250 WILLIAMS STREET NW

City

ATLANTA

State

GA

Zip Code

30303

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

SUPPORT OF HOPE LODGE

Amount

150,000

Name

AMERICAN WEST HERITAGE CENTER

Street

4025 S HWY US-89-91

City

WELLSVILLE

State

UT

Zip Code

84339

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL SUPPORT GRANT

Amount

7,500

Name

CACHE VALLEY CENTER FOR THE ARTS

Street

43 S MAIN ST

City

LOGAN

State

UT

Zip Code

84321

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

SUPPORT OF ELLEN ECCLES THEATRE

Amount

15,000

Name

CACHE VALLEY CENTER FOR THE ARTS

Street

43 S MAIN ST

City

LOGAN

State

UT

Zip Code

84321

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

LOGAN YOUTH SHAKESPEARE

Amount

10,000

Name

THE CHILDREN'S CENTER

Street

350 SOUTH 400 EAST

City

SALT LAKE CITY

State

UT

Zip Code

84111

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL SUPPORT GRANT

Amount

15,000

Continuation of Part XV, Line 3a (990-PF) - Grants and Contributions Paid During the Year

Recipient(s) paid during the year

Name

ECCLES COMMUNITY ARTS CENTER

Street

2580 JEFFERSON AVE

City

OGDEN

State

UT

Zip Code

84401

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL SUPPORT GRANT

Amount

2,000

Name

JUNIOR ACHIEVEMENT OF UTAH INC

Street

515 100 S #200

City

SALT LAKE CITY

State

UT

Zip Code

84102

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL SUPPORT GRANT

Amount

8,000

Name

REPERTORY DANCE THEATRE

Street

138 300 S

City

SALT LAKE CITY

State

UT

Zip Code

84101

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL SUPPORT GRANT

Amount

25,000

Name

RIRIE WOODBURY DANCE FOUNDATION

Street

138 BROADWAY

City

SALT LAKE CITY

State

UT

Zip Code

84101

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL SUPPORT GRANT

Amount

10,000

Name

SPY HOP INSTITUTE

Street

122 S MAIN ST

City

SALT LAKE CITY

State

UT

Zip Code

84101

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL SUPPORT GRANT

Amount

2,500

Name

SOUTHERN UTAH UNIVERSITY

Street

351 W CENTER ST

City

CEDAR CITY

State

UT

Zip Code

84720

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL SUPPORT GRANT

Amount

20,000

Continuation of Part XV, Line 3a (990-PF) - Grants and Contributions Paid During the Year

Recipient(s) paid during the year

Name

THERAPY ANIMALS OF UTAH

Street

4050 SOUTH 2700 EAST

City

SALT LAKE CITY

State

UT

Zip Code

84124

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL SUPPORT GRANT

Amount

5,000

Name

UNITED WAY OF SALT LAKE

Street

257 200 S

City

SALT LAKE CITY

State

UT

Zip Code

84111

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL SUPPORT GRANT

Amount

10,000

Name

UNIVERSITY OF UTAH

Street

201 PRESIDENTS CIR

City

SALT LAKE CITY

State

UT

Zip Code

84112

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

COLLEGE OF FINE ARTS

Amount

4,000

Name

UNIVERSITY OF UTAH

Street

201 PRESIDENTS CIR

City

SALT LAKE CITY

State

UT

Zip Code

84112

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

NATURAL HISTORY MUSEUM OF UTAH

Amount

50,000

Name

UTAH YOUTH VILLAGE

Street

5800 SOUTH HIGHLAND DR

City

SALT LAKE CITY

State

UT

Zip Code

84121

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

FAMILIES FIRST PROGRAM

Amount

20,000

Name

YWCA SALT LAKE CITY

Street

322 BROADWAY

City

SALT LAKE CITY

State

UT

Zip Code

84111

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL SUPPORT GRANT

Amount

25,000

Continuation of Part XV, Line 3a (990-PF) - Grants and Contributions Paid During the Year

Recipient(s) paid during the year

Name

UTAH NONPROFITS ASSOCIATION

Street

231 EAST 400 SOUTH, SUITE 345

City

SALT LAKE CITY

State

UT

Zip Code

84111

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL SUPPORT GRANT

Amount

2,000

Name

UTAH STATE UNIVERSITY

Street

1600 OLD MAIN HILL

City

LOGAN

State

UT

Zip Code

84322

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL SUPPORT GRANT

Amount

3,000,000

Name

BALLET WEST

Street

52 W 200 S

City

SALT LAKE CITY

State

UT

Zip Code

84101

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL CONSTRUCTION ACCOUNT

Amount

1,550,000

Name

GEORGE S ECCLES ICE CENTER

Street

2825 N 200 E

City

NORTH LOGAN

State

UT

Zip Code

84341

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL SUPPORT GRANT

Amount

15,000

Name

GUADALUPE SCHOOLS

Street

1385 N 1200 W

City

SALT LAKE CITY

State

UT

Zip Code

84116

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL SUPPORT GRANT

Amount

25,000

Name

INTERMOUNTAIN THERAPY ANIMALS

Street

4050 SOUTH 2700 EAST

City

SALT LAKE CITY

State

UT

Zip Code

84124

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL SUPPORT GRANT

Amount

10,000

Continuation of Part XV, Line 3a (990-PF) - Grants and Contributions Paid During the Year

Recipient(s) paid during the year

Name

NEIGHBORHOOD HOUSE

Street

1050 500 S

City

SALT LAKE CITY

State

UT

Zip Code

84104

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL SUPPORT GRANT

Amount

20,000

Name

PLANNED PARENTHOOD ASSOCIATION OF UTAH

Street

654 S 900 E

City

SALT LAKE CITY

State

UT

Zip Code

84102

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL SUPPORT GRANT

Amount

15,000

Name

RONALD MCDONALD HOUSE

Street

935 S TEMPLE

City

SALT LAKE CITY

State

UT

Zip Code

84102

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL SUPPORT GRANT

Amount

18,000

Name

SALT LAKE ACTING COMPANY

Street

168 W 500 N

City

SALT LAKE CITY

State

UT

Zip Code

84103

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL SUPPORT GRANT

Amount

25,000

Name

ULSTER PROJECT UTAH, INC

Street

806 NORTHPOINT DR

City

SALT LAKE CITY

State

UT

Zip Code

84103

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL SUPPORT GRANT

Amount

8,000

Name

UTAH MUSEUM OF FINE ARTS

Street

410 CAMPUS CENTER DR

City

SALT LAKE CITY

State

UT

Zip Code

84112

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL SUPPORT GRANT

Amount

25,000

Continuation of Part XV, Line 3a (990-PF) - Grants and Contributions Paid During the Year

Recipient(s) paid during the year

Name

KUED

Street

101 S WASATCH DR

City

SALT LAKE CITY

State

UT

Zip Code

84112

Foreign Country

Relationship

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL SUPPORT GRANT

Amount

50,000

Name

KUER

Street

101 S WASTATCH DR #240

City

SALT LAKE CITY

State

UT

Zip Code

84112

Foreign Country

Relationship

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL SUPPORT GRANT

Amount

10,000

Name

PIONEER MEMORIAL THEATRE

Street

200 S 1400 E

City

SALT LAKE CITY

State

UT

Zip Code

84112

Foreign Country

Relationship

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL SUPPORT GRANT

Amount

50,000

Name

RED BUTTE GARDEN & ARBORETUM

Street

300 WAKARA WAY

City

SALT LAKE CITY

State

UT

Zip Code

84108

Foreign Country

Relationship

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL SUPPORT GRANT

Amount

15,000

Name

UTAH SHAKESPEARE FESTIVAL

Street

299 W CENTER ST

City

CEDAR CITY

State

UT

Zip Code

84720

Foreign Country

Relationship

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL SUPPORT GRANT

Amount

30,000

Name

UTAH SYMPHONY & OPERA

Street

123 S TEMPLE

City

SALT LAKE CITY

State

UT

Zip Code

84101

Foreign Country

Relationship

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL SUPPORT GRANT

Amount

100,000

"X" if Transfer or Loss	Date Acquired	Acquisition Method	Date Sold	Gross Sales Price	Totals				Net Gain or Loss	
					Capital Gains/Losses Other sales		Cost, Other Basis and Expenses			Net Gain or Loss
					Gross Sales	Cost or Other Basis	Valuation Method	Expense of Sale and Cost of Improve- ments		
	1/29/2010		5/20/2014	290,861	135,782	10,786,564	8,911,145	1,875,419		
	2/11/2011		5/20/2014	4,252	2,039	0	0	0		
	3/25/2011		7/8/2014	282,877	292,643					
	4/20/2011		7/8/2014	148,048	155,911					
	1/28/2008		5/20/2014	272,287	140,541					
	5/27/2008		5/20/2014	108,915	56,235					
	2/4/2010		5/21/2014	91,913	58,194					
	1/12/2009		5/21/2014	43,450	28,838					
	6/6/2012		10/11/2013	5,744	5,993					
	7/31/2013		10/11/2013	5,000	4,988					
	8/30/2013		10/11/2013	6,275	6,210					
	4/17/2008		7/30/2014	281,523	310,322					
	9/30/2013		10/11/2013	4,955	4,959					
	5/29/2012		10/11/2013	328,025	344,094					
	8/3/2011		10/17/2013	633,600	289,273					
	5/29/2012		10/17/2013	35,000	36,538					
	5/29/2012		11/27/2013	2,848,008	2,977,878					
	5/31/2012		11/27/2013	396	417					
	6/29/2012		11/27/2013	7,317	7,704					
	7/31/2012		11/27/2013	7,866	8,415					
	8/31/2012		11/27/2013	6,794	7,256					
	9/28/2012		11/27/2013	5,933	6,370					
	10/31/2012		11/27/2013	6,986	7,517					
	11/30/2012		11/27/2013	7,238	7,794					
	6/18/2012		11/27/2013	4,995	5,200					
	4/12/2006		9/24/2013	3,694,718	3,462,227					
	12/14/2007		9/24/2013	434,469	361,811					
	12/18/2007		9/24/2013	21,412	17,479					
	12/17/2009		9/24/2013	35,914	28,386					
	12/16/2010		9/24/2013	44,016	38,651					
	12/15/2011		9/24/2013	32,952	25,947					
	12/13/2012		9/24/2013	22,586	20,358					
	10/22/2013		3/11/2014	83,173	56,190					
				638,223	4,253					
				54,896	596					
				8,614	8,614					

Part I, Line 11 (990-PF) - Other Income

		93,119	93,119	0
Description		Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income
1	FROM PARTNERSHIPS	159,680	159,680	
2	UBTI	-66,561	-66,561	

Part I, Line 16a (990-PF) - Legal Fees

		31,712	0	0	31,712
Description		Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes (Cash Basis Only)
1	LEGAL FEES	31,712			31,712

Part I, Line 18 (990-PF) - Taxes

		95,008	17,008	0	0
	Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
1	FOREIGN TAX	17,008	17,008		
2	PY EXCISE TAX DUE	45,000			
3	PY 990-T PAYMENTS	12,000			
4	ESTIMATED PAYMENTS - 990PF	21,000			

Part I, Line 23 (990-PF) - Other Expenses

		458,871	458,871	0	0
Description		Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
1	PARTNERSHIP EXPENSES	458,871	458,871		
2					

Part II, Line 13 (990-PF) - Investments - Other

Asset Description		Basis of Valuation	Book Value Beg. of Year	Book Value End of Year	FMV End of Year
1	SEE ATTACHMENT		69,085,735	70,283,114	121,313,439
				70,283,114	121,313,439

Part III (990-PF) - Changes in Net Assets or Fund Balances

Line 3 - Other increases not included in Part III, Line 2

1	COST BASIS ADJUSTMENT	1	4,424
2	MUTUAL FUND TIMING DIFFERENCE	2	6,220
3	PARTNERSHIP DISTRIBUTION ADJUSTMENT	3	1,841,810
4	FEDERAL EXCISE TAX REFUND - 990T	4	24,000
5	Total	5	1,876,454

Line 5 - Decreases not included in Part III, Line 2

1	PARTNERSHIP INCOME ADJUSTMENT	1	639,160
2	Total	2	639,160

Part IV (990-PF) - Capital Gains and Losses for Tax on Investment Income

Long Term CG Distributions		Short Term CG Distributions		2016		2017		2018		2019		2020		2021		2022		2023		2024		2025		2026		2027		2028		2029		2030		2031		2032		2033		2034		2035		2036		2037		2038		2039		2040		2041		2042		2043		2044		2045		2046		2047		2048		2049		2050		2051		2052		2053		2054		2055		2056		2057		2058		2059		2060		2061		2062		2063		2064		2065		2066		2067		2068		2069		2070		2071		2072		2073		2074		2075		2076		2077		2078		2079		2080		2081		2082		2083		2084		2085		2086		2087		2088		2089		2090		2091		2092		2093		2094		2095		2096		2097		2098		2099		2100		2101		2102		2103		2104		2105		2106		2107		2108		2109		2110		2111		2112		2113		2114		2115		2116		2117		2118		2119		2120		2121		2122		2123		2124		2125		2126		2127		2128		2129		2130		2131		2132		2133		2134		2135		2136		2137		2138		2139		2140		2141		2142		2143		2144		2145		2146		2147		2148		2149		2150		2151		2152		2153		2154		2155		2156		2157		2158		2159		2160		2161		2162		2163		2164		2165		2166		2167		2168		2169		2170		2171		2172		2173		2174		2175		2176		2177		2178		2179		2180		2181		2182		2183		2184		2185		2186		2187		2188		2189		2190		2191		2192		2193		2194		2195		2196		2197		2198		2199		2200		2201		2202		2203		2204		2205		2206		2207		2208		2209		2210		2211		2212		2213		2214		2215		2216		2217		2218		2219		2220		2221		2222		2223		2224		2225		2226		2227		2228		2229		2230		2231		2232		2233		2234		2235		2236		2237		2238		2239		2240		2241		2242		2243		2244		2245		2246		2247		2248		2249		2250		2251		2252		2253		2254		2255		2256		2257		2258		2259		2260		2261		2262		2263		2264		2265		2266		2267		2268		2269		2270		2271		2272		2273		2274		2275		2276		2277		2278		2279		2280		2281		2282		2283		2284		2285		2286		2287		2288		2289		2290		2291		2292		2293		2294		2295		2296		2297		2298		2299		2300		2301		2302		2303		2304		2305		2306		2307		2308		2309		2310		2311		2312		2313		2314		2315		2316		2317		2318		2319		2320		2321		2322		2323		2324		2325		2326		2327	
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Part VIII, Line 1 (990-PF) - Compensation of Officers, Directors, Trustees and Foundation Managers

193,261													0
193,261													0
	Name	Check "X" if Business	Street	City	State	Zip Code	Foreign Country	Title	Avg Hrs Per Week	Compensation	Benefits	Expense Account	
1	Wells Fargo Bank N A Trust Tax D	X	PO Box 53456 MAC S4101-22G	Phoenix	AZ	85072-3456		Trustee	4.00	169,261			
2	Robert Hatch		1131 East 1500 South	Salt Lake City	UT	84010		Director	1.00	6,000			
3	Frederick Lawson		4294 Adonis Drive	Salt Lake City	UT	84124		Director	1.00	6,000			
4	Spencer Eccles		PO Box 3028	Salt Lake City	UT	84110		Director	1.00	6,000			
5	Clark Giles		PO Box 45385	Salt Lake City	UT	84145		Director	1.00	6,000			

Part VI, Line 6a (990-PF) - Estimated Tax Payments

	Date		Amount
1 Credit from prior year return		1	51,835
2 First quarter estimated tax payment		2	21,000
3 Second quarter estimated tax payment		3	
4 Third quarter estimated tax payment		4	
5 Fourth quarter estimated tax payment		5	
6 Other payments		6	
7 Total		7	72,835

Part XIII, Line 2a, Column C (990-PF) - Prior Year Undistributed Income

1	Distributable amounts for 2012 that remained undistributed at the beginning of the 2013 tax year	1	3,604,744
2		2	
3		3	
4		4	
5		5	
6		6	
7		7	
8		8	
9		9	
10	Total	10	3,604,744

Statement A

Emma Eccles Jones Foundation

EIN: 87-6155073

Utah Attorney General does not require and prefers that we do not furnish a copy of Form 990PF to their office.

Security Type	EIN	CUSIP	Asset Name	Units	FMV	Fed Cost
Savings & Temp Inv	87-6155073	VP4500022	WF ADV CASH INVT MM FD-SVC #250	1,069,405 28	1,069,405 28	1,069,405 28
Savings & Temp Inv	87-6155073	VP4500022	WF ADV CASH INVT MM FD-SVC #250	0 20	0 20	0 20
Total Cash & Savings & Temp Inv					<u>\$ 1,069,405.48</u>	<u>\$ 1,069,405.48</u>
Invest - Corp Stock	87-6155073	V7780T103	ROYAL CARRIBEAN CRUISE	10,500 00	669,480 00	266,878 50
Invest - Corp Stock	87-6155073	00724F101	ADOBE SYS INC	11,500 00	826,850 00	357,899 21
Invest - Corp Stock	87-6155073	020002101	ALLSTATE CORP	7,000 00	430,430 00	430,922 10
Invest - Corp Stock	87-6155073	023135106	AMAZON COM INC COM	1,800 00	610,272 00	133,920 90
Invest - Corp Stock	87-6155073	032511107	ANADARKO PETROLEUM CORP	6,400 00	721,216 00	323,943 79
Invest - Corp Stock	87-6155073	037833100	APPLE INC	11,900 00	1,219,750 00	784,288 01
Invest - Corp Stock	87-6155073	054937107	B B & T CORP COM	17,500 00	653,275 00	599,900 63
Invest - Corp Stock	87-6155073	097023105	BOEING CO	4,300 00	545,240 00	388,961 66
Invest - Corp Stock	87-6155073	110122108	BRISTOL MYERS SQUIBB CO	12,300 00	622,995 00	340,756 74
Invest - Corp Stock	87-6155073	149123101	CATERPILLAR INC	7,000 00	763,490 00	487,774 04
Invest - Corp Stock	87-6155073	156782104	CERNER CORP COM	11,000 00	634,260 00	300,429 25
Invest - Corp Stock	87-6155073	17275R102	CISCO SYSTEMS INC	16,300 00	407,337 00	406,932 86
Invest - Corp Stock	87-6155073	172908105	CINTAS CORP	6,030 00	398,824 20	175,637 62
Invest - Corp Stock	87-6155073	235851102	DANAHER CORP	6,100 00	467,321 00	282,808 20
Invest - Corp Stock	87-6155073	244199105	DEERE & CO	4,520 00	380,086 80	349,166 85
Invest - Corp Stock	87-6155073	254687106	WALT DISNEY CO	7,100 00	638,148 00	243,476 72
Invest - Corp Stock	87-6155073	263534109	DU PONT E I DE NEMOURS & CO	8,700 00	575,157 00	428,592 45
Invest - Corp Stock	87-6155073	35671D857	FREEPORT-MCMORAN INC	12,930 00	470,264 10	481,297 09
Invest - Corp Stock	87-6155073	369604103	GENERAL ELECTRIC CO	905,800 00	23,532,684 00	14,046,687 06
Invest - Corp Stock	87-6155073	375558103	GILEAD SCIENCES INC	8,800 00	946,528 00	525,107 26
Invest - Corp Stock	87-6155073	406216101	HALLIBURTON CO	10,000 00	676,100 00	437,348 94
Invest - Corp Stock	87-6155073	437076102	HOME DEPOT INC	8,600 00	804,100 00	281,189 90
Invest - Corp Stock	87-6155073	458140100	INTEL CORP	18,300 00	639,036 00	394,107 00
Invest - Corp Stock	87-6155073	459200101	INTERNATIONAL BUSINESS MACHS CORP	3,400 00	653,820 00	397,971 36
Invest - Corp Stock	87-6155073	478160104	JOHNSON & JOHNSON	6,200 00	643,126 00	395,277 06
Invest - Corp Stock	87-6155073	526057104	LENNAR CORPORATION CLASS A COMMON	13,800 00	540,684 00	289,555 74
Invest - Corp Stock	87-6155073	580135101	MCDONALDS CORP	4,800 00	449,856 00	215,947 68
Invest - Corp Stock	87-6155073	594918104	MICROSOFT CORP	15,100 00	685,993 00	351,795 40
Invest - Corp Stock	87-6155073	617446448	MORGAN STANLEY	16,240 00	557,194 40	405,388 07
Invest - Corp Stock	87-6155073	674599105	OCCIDENTAL PETE CORP	4,000 00	414,920 00	267,458 18
Invest - Corp Stock	87-6155073	68389X105	ORACLE CORPORATION	11,700 00	485,901 00	215,920 53
Invest - Corp Stock	87-6155073	693475105	PNC FINANCIAL SERVICES GROUP	8,480 00	718,680 00	541,161 34
Invest - Corp Stock	87-6155073	717081103	PFIZER INC	17,234 00	506,507 26	438,272 68
Invest - Corp Stock	87-6155073	73755L107	POTASH CORP SASK	11,380 00	400,120 80	483,576 81
Invest - Corp Stock	87-6155073	742718109	PROCTER & GAMBLE CO	6,800 00	565,148 00	450,189 52
Invest - Corp Stock	87-6155073	747525103	QUALCOMM INC	8,500 00	646,850 00	432,371 51
Invest - Corp Stock	87-6155073	806857108	SCHLUMBERGER LTD	5,300 00	581,092 00	517,004 00
Invest - Corp Stock	87-6155073	907818108	UNION PACIFIC CORP	38,684 00	4,072,264 68	451,577 83
Invest - Corp Stock	87-6155073	913017109	UNITED TECHNOLOGIES CORP	5,300 00	572,294 00	332,425 64
Invest - Corp Stock	87-6155073	931142103	WAL MART STORES INC	7,400 00	558,700 00	321,066 94
Invest - Corp Stock	87-6155073	931422109	WALGREEN CO	7,900 00	478,108 00	288,529 33
Invest - Corp Stock	87-6155073	191216100	COCA COLA CO	9,700 00	404,684 00	292,928 30
Invest - Corp Stock	87-6155073	278642103	EBAY INC	7,200 00	399,600 00	228,319 20
Invest - Corp Stock	87-6155073	38259P706	GOOGLE INC-CL C	1,430 00	817,388 00	586,419 40
Invest - Corp Stock	87-6155073	060505104	BANK OF AMERICA CORP	40,460 00	651,001 40	1,157,599 62
Invest - Corp Stock	87-6155073	38141G104	GOLDMAN SACHS GROUP INC	2,800 00	501,508 00	420,827 68
Invest - Corp Stock	87-6155073	22160K105	COSTCO WHOLESALE CORP	3,700 00	447,996 00	280,035 61
Invest - Corp Stock	87-6155073	30231G102	EXXON MOBIL CORPORATION	7,600 00	755,896 00	453,267 20
Invest - Corp Stock	87-6155073	31428X106	FEDEX CORPORATION	3,300 00	488,004 00	265,793 55
Invest - Corp Stock	87-6155073	91324P102	UNITEDHEALTH GROUP INC	7,600 00	658,768 00	279,521 16
Invest - Corp Stock	87-6155073	92343V104	VERIZON COMMUNICATIONS	8,500 00	423,470 00	285,207 30
Invest - Corp Stock	87-6155073	61166W101	MONSANTO CO NEW	4,000 00	462,600 00	286,588 00
Invest - Corp Stock	87-6155073	46625H100	JPMORGAN CHASE & CO	10,100 00	600,445 00	438,417 31
Invest - Corp Stock	87-6155073	74144T108	T ROWE PRICE GROUP INC	4,870 00	394,445 65	288,016 18
Invest - Corp Stock	87-6155073	902973304	US BANCORP DEL NEW	25,450 00	1,076,026 00	812,985 28
Invest - Corp Stock	87-6155073	G1151C101	ACCENTURE PLC	6,300 00	510,678 00	267,266 16
Invest - Corp Stock	87-6155073	166764100	CHEVRON CORP	3,100 00	401,295 00	274,528 25
Invest - Corp Stock	87-6155073	58933Y105	MERCK & CO INC NEW	7,800 00	468,858 00	422,379 12
Invest - Corp Stock	87-6155073	084670702	BERKSHIRE HATHAWAY INC	5,400 00	741,150 00	460,738 80
Invest - Corp Stock	87-6155073	20825C104	CONOCOPHILLIPS	6,600 00	536,052 00	425,477 36
Invest - Corp Stock	87-6155073	09062X103	BIODER IDEC INC	1,400 00	480,256 00	407,187 20
Invest - Corp Stock	87-6155073	91911K102	VALEANT PHARMACEUTICALS	3,540 00	415,242 00	433,180 24
Invest - Corp Stock	87-6155073	910047109	UNITED CONTINENTAL HOLDINGS, INC	9,865 00	469,672 65	230,018 81
Invest - Corp Stock	87-6155073	79466L302	SALESFORCE COM INC	10,130 00	598,581 70	589,440 85
Invest - Corp Stock	87-6155073	37045V100	GENERAL MOTORS CO	14,425 00	501,990 00	476,025 00
Invest - Corp Stock	87-6155073	172967424	CITIGROUP INC	14,724 00	760,494 60	555,317 59
Invest - Corp Stock	87-6155073	00206R102	AT & T INC	14,400 00	503,424 00	396,942 79
Invest - Corp Stock	87-6155073	26441C204	DUKE ENERGY HOLDING CORP COM	5,200 00	384,748 00	343,354 44

Invest - Corp Stock	87-6155073	718546104	PHILLIPS 66	8,000 00	696,160 00	315,264 47
Invest - Corp Stock	87-6155073	609207105	MONDELEZ INTERNATIONAL INC	13,940 00	504,488 60	325,709.19
Invest - Corp Stock	87-6155073	98978V103	ZOETIS INC	16,005 00	567,217 20	448,603 27
Invest - Corp Stock	87-6155073	G0083B108	ACTAVIS PLC	4,010 00	910,189 80	577,440 00
Invest - Corp Stock	87-6155073	949746101	WELLS FARGO & CO	260,000 00	13,374,400 00	1,371,355 71
Invest - Other	87-6155073	298706409	AMERICAN EUROPAC GROWTH-F #416	91,239 70	4,542,824 61	3,924,167 80
Invest - Other	87-6155073	94975J581	WFA CORE BD FD-I #944	333 21	4,238 42	4,351 87
Invest - Other	87-6155073	94975P751	WELLS FARGO ADV EMG MK E-INS #4146	96,045 24	2,310,848 50	2,167,211 90
Invest - Other	87-6155073	949915359	WF ADV DISCOVERY FUND-ADM #3703	200,654 30	6,916,553 55	4,669,782 91
Invest - Other	87-6155073	57060U233	MARKET VECTORS SEMICONDUCTOR	15,900 00	821,712 00	383,158 80
Invest - Other	87-6155073	78464A888	SPDR SERIES TRUST	16,300 00	514,265 00	223,666 97
Invest - Other	87-6155073	949915235	WFA INTRINS S/C VAL-I #3143	270,817 38	6,805,640 63	6,009,739 52
Other Assets	87-6155073	MS6242437	KEYSTONE PRIVATE EQUITY II LP *CH*	1 00	4,732,588 53	4,314,649 00
Other Assets	87-6155073	MS6375161	CARLYLE GLOBAL FIN SERV LP *CH*	1 00	1,984,689 00	2,036,454 00
Other Assets	87-6155073	MS6410455	PEER VENTURES GROUP III, L P *CH*	2,110,260 00	10,240,118 95	2,110,260 00
Other Assets	87-6155073	MS6528959	PELION VENTURES V LP *CH*	420,000 00	369,127 08	780,000 00
Total Investments - Other					<u>\$ 121,313,439.11</u>	<u>\$ 70,283,114.21</u>
Total Assets					<u>\$ 122,382,844.59</u>	<u>\$ 71,352,519.69</u>

Application for Extension of Time To File an Exempt Organization Return

OMB No. 1545-1709

► File a separate application for each return.

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

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

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

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

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

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

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

Enter filer's identifying number, see instructions

Type or print File by the due date for filing your return. See instructions.	Name of exempt organization or other filer, see instructions	Employer identification number (EIN) or
	EMMA ECCLES JONES FOUNDATION	87-6155073
	Number, street, and room or suite no. If a P.O. box, see instructions	Social security number (SSN)
	Wells Fargo Bank N.A. Trust Tax Dept - PO Box 53456 MAC S4101-22G	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions	
	Phoenix, AZ 85072-3456	

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

04

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 ► WELLS FARGO BANK N.A.

Telephone No. ► (888) 730-4933

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 4/15/2015, to file the exempt organization return for the organization named above. The extension is for the organization's return for
- ☐ calendar year _____ or

► ☒ tax year beginning 9/1/2013, and ending 8/31/2014

- 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 Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	87,100
b If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$	72,835
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$	45,000

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)

HTA

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- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** and check this box. ☒ **X**
- Note.** Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868
- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** (on page 1)

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

Enter filer's identifying number, see instructions	
Type or print	Name of exempt organization or other filer, see instructions
	EMMA ECCLES JONES FOUNDATION
	Employer identification number (EIN) or
	87-6155073
	Number, street, and room or suite no. If a P O box, see instructions
	Wells Fargo Bank N.A. Trust Tax Dept - PO Box 53456 MAC S4101-22G
	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions
	Phoenix, AZ 85072-3456

Enter the Return code for the return that this application is for (file a separate application for each return) **04**

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

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

- The books are in the care of **WELLS FARGO BANK N.A.**
Telephone No. **(888) 730-4933** Fax No.
- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) . If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for.

- 4 I request an additional 3-month extension of time until **7/15/2015**
- 5 For calendar year , or other tax year beginning **9/1/2013**, and ending **8/31/2014**
- 6 If the tax year entered in line 5 is for less than 12 months, check reason ☐ Initial return ☐ Final return
☐ Change in accounting period
- 7 State in detail why you need the extension: An attempt to obtain information necessary for filing a return was requested in a timely fashion, but the information was not furnished in sufficient time to permit the timely filing of the return, or the taxpayer personally visited an IRS office for the purpose of securing information or advice and was unable to meet with an IRS representative.

8a If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions	8a	\$	72,462
b If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868	8b	\$	117,837
c Balance due. Subtract line 8b from line 8a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions	8c	\$	0

Signature and Verification must be completed for Part II only.

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

Signature **Daniel A. Morris** Title **MANAGER** Date **3/30/14**