



See a Social Security Number? Say Something!
Report Privacy Problems to <https://public.resource.org/privacy>
Or call the IRS Identity Theft Hotline at 1-800-908-4490



Form **990-PF**Department of the Treasury
Internal Revenue Service**Return of Private Foundation**
or Section 4947(a)(1) Trust Treated as Private Foundation

OMB No 1545-0052

2013

Open to Public Inspection

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

For calendar year 2013 or tax year beginning 10/1/2013, and ending 9/30/2014

Name of foundation The Burkland Foundation			A Employer identification number 46-1607779	
Number and street (or PO box number if mail is not delivered to street address) PO Box 467		Room/suite	B Telephone number (see instructions) 724-493-6161	
City or town Ligonier	State PA	ZIP code 15658		
Foreign country name		Foreign province/state/country	Foreign postal code	
G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change			D 1 Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/> E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/> F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____		
I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ \$ 1,131,048		(Part I, column (d) must be on cash basis)		

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 <input type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	20	20		
	4 Dividends and interest from securities	26,634	26,634		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	21,070			
	b Gross sales price for all assets on line 6a 650,912				
	7 Capital gain net income (from Part IV, line 2)		21,070		
	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	47,724	47,724	0		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	2,500	2,500		
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	754	754		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	492	492		
	24 Total operating and administrative expenses. Add lines 13 through 23	3,746	3,746	0	0
	25 Contributions, gifts, grants paid	40,000			40,000
26 Total expenses and disbursements. Add lines 24 and 25	43,746	3,746	0	40,000	
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements	3,978				
b Net investment income (if negative, enter -0-)		43,978			
c Adjusted net income (if negative, enter -0-)			0		

SCANNED JAN 06 2015



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	390,562	121,950	121,950
	2	Savings and temporary cash investments			
	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)	599,312	872,045	1,008,470
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment, basis ▶			
		Less accumulated depreciation (attach schedule) ▶			
Liabilities	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment basis ▶			
		Less accumulated depreciation (attach schedule) ▶			
	15	Other assets (describe ▶ ACCRUED INTEREST)			628
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	989,874	993,995	1,131,048
	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
Net Assets or Fund Balances	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶)			
	23	Total liabilities (add lines 17 through 22)	0	0	
		Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. ▶ <input type="checkbox"/>			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ <input checked="" type="checkbox"/>			
	27	Capital stock, trust principal, or current funds	989,874	993,995	
	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)	989,874	993,995	
	31	Total liabilities and net assets/fund balances (see instructions)	989,874	993,995	

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	989,874
2	Enter amount from Part I, line 27a	2	3,978
3	Other increases not included in line 2 (itemize) ▶ Net Asset Adjustment	3	137,196
4	Add lines 1, 2, and 3	4	1,131,048
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	1,131,048

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	Charles Schwab - See Attached	P	1/18/2013	10/1/2013
b	Charles Schwab - See Attached	P	1/18/2013	9/30/2014
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 482,997		466,997	16,000
b 167,907		162,845	5,062
c			
d			
e			

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			16,000
b			5,062
c			
d			
e			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	21,070
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	16,000

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	0	1,005,241	0.000000
2011			0.000000
2010			0.000000
2009			0.000000
2008			0.000000

2 Total of line 1, column (d)	2	0.000000
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	0.000000
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	1,096,535
5 Multiply line 4 by line 3	5	
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	440
7 Add lines 5 and 6	7	440
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	40,000

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 Date of ruling or determination letter <u>12/20/2012</u> (attach copy of letter if necessary—see instructions)			
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1		440
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		440
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		440
6	Credits/Payments			
a	2013 estimated tax payments and 2012 overpayment credited to 2013	6a		
b	Exempt foreign organizations—tax withheld at source	6b		
c	Tax paid with application for extension of time to file (Form 8868)	6c		
d	Backup withholding erroneously withheld	6d		
7	Total credits and payments. Add lines 6a through 6d	7		0
8	Enter any penalty for underpayment of estimated tax. Check here <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		440
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		0
11	Enter the amount of line 10 to be: Credited to 2014 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	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 <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? <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) <input type="checkbox"/> PA		
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 ▶	13	X	
14	The books are in care of ▶ Elliott Burkland Telephone no ▶ 724-493-6161 Located at ▶ PO Box 467 Ligonier PA ZIP+4 ▶ 15658			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041—Check here and enter the amount of tax-exempt interest received or accrued during the year ▶ 15			
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? 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? <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 type="checkbox"/> Yes <input checked="" 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)? Organizations relying on a current notice regarding disaster assistance check here ▶ <input type="checkbox"/>	1b	N/A
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?	1c	X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a	At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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? <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)	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)

<p>5a During the year did the foundation pay or incur any amount to</p> <p>(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?</p> <p>(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?</p> <p>(3) Provide a grant to an individual for travel, study, or other similar purposes?</p> <p>(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)</p> <p>(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?</p> <p>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)?</p> <p>Organizations relying on a current notice regarding disaster assistance check here ▶ <input type="checkbox"/></p> <p>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?</p> <p>If "Yes," attach the statement required by Regulations section 53.4945–5(d)</p> <p>6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?</p> <p>b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?</p> <p>If "Yes" to 6b, file Form 8870</p> <p>7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?</p> <p>b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?</p>	<p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p>	<p>5b N/A</p> <p>6b X</p> <p>7b N/A</p>
---	--	--

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

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 N/A	
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	
2	
All other program-related investments. See instructions	
3	
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	932,492
b	Average of monthly cash balances	1b	180,741
c	Fair market value of all other assets (see instructions)	1c	
d	Total (add lines 1a, b, and c)	1d	1,113,233
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	1,113,233
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see instructions)	4	16,698
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,096,535
6	Minimum investment return. Enter 5% of line 5	6	54,827

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	54,827
2a	Tax on investment income for 2013 from Part VI, line 5	2a	440
b	Income tax for 2013 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	440
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	54,387
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	54,387
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	54,387

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	40,000
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	40,000
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	440
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	39,560

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				54,387
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only			39,084	
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 ▶ \$ 40,000				
a Applied to 2012, but not more than line 2a			39,084	
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				916
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	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				53,471
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)

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)

2a 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	
	131			131
b 85% of line 2a	111			111
c Qualifying distributions from Part XII, line 4 for each year listed	40,000			40,000
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	40,000			40,000
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	36,551	26,255		62,806
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))
- 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

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

WILLIAM BURKLAND PO BOX 427 LIGONIER, PA 15658

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

N/A

- c** Any submission deadlines

NONE

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

NONE

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> Children's Hospital of Pittsburgh Foundation 4401 Penn Avenue Pittsburgh, PA 15224 Western Pennsylvania Conservancy 800 Waterfront Drive Pittsburgh, PA 15222 Westmoreland County Historical Society 362 Sand Hill Road Greensburg, PA 15601 The Children's Institute 1405 Shady Avenue Pittsburgh, PA 15217 Magee Womens Research Institute & Foundation 3339 Ward Street Pittsburgh, PA 15213			Unrestricted Charitable Gift Support Community Gardens & Greenspace vegetable gardens initiative Unrestricted Charitable Gift Unrestricted Charitable Gift Research	10,000 12,000 4,000 10,000 4,000
Total			3a	40,000
b <i>Approved for future payment</i>				
Total			3b	0

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 | 1a |
| | (2) Other assets | 1a |
| b | Other transactions | |
| | (1) Sales of assets to a noncharitable exempt organization | 1b |
| | (2) Purchases of assets from a noncharitable exempt organization | 1b |
| | (3) Rental of facilities, equipment, or other assets | 1b |
| | (4) Reimbursement arrangements | 1b |
| | (5) Loans or loan guarantees | 1b |
| | (6) Performance of services or membership or fundraising solicitations | 1b |
| 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**

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.

XW. Ellett Buckner
Signature of officer or trustee

12/23/14
Date

Director, Treasurer

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

**Paid
Preparer
Use Only**

Print/Type preparer's name

ROBERT D HOAG CPA, MST

Preparer's signature

Plant

Date

11/25/44

Check ☐ if self-employed

PTIN

P00651232

Firm's name ▶ R D HOAG AND ASSOCIATES, P C

Firm's address ► 555 NORTH BELL AVE, SUITE 100, CARNEGIE, PA 15106

Firm's EIN ▶ 25-1365816

Phone no	412-278-1600
----------	--------------

Firm's address ► 555 NORTH BELL AVE, SUITE 100, CARNEGIE, PA 15106

Phone no	412-278-1600
----------	--------------

Form **990**

Part I, Line 6 (990-PF) - Gain/Loss from Sale of Assets Other Than Inventory

Check "X" to include to include in Part IV		Description	CUSIP #	Purchaser	Check "X" if Purchaser is a Business	Date Acquired	Acquisition Method	Date Sold	Gross Sales Price	Cost or Other Basis	Valuation Method	Expense of Sale and Cost of Improvements	Totals		
													Gross Sales	Cost, Other Basis and Expenses	Net Gain or Loss
										Capital Gains/Losses		629,842		21,070	
										Other sales		0		0	
1	X	Charles Schwab - See Attached				1/18/2013	P	10/1/2013	482,997	466,997					16,000
2	X	Charles Schwab - See Attached				1/18/2013	P	9/30/2014	167,907	162,845					5,062

Amount

8

Long Term CG Distributions
Short Term CG Distributions

The Burkland Foundation
Realized Gain (Loss) Schedule
Form 990 Part IV (Detail)
FYE 9/30/14

Date Purchased	Date Sold	Shares	Description	Proceeds	Cost Basis	Realized Gain (Loss)	
						Short Term	Long Term
01/18/13	09/26/13	75 00	Johnson & Johnson	6,548.94	5,473.13	1,075.81	
Various	09/27/13	875 00	Alon USA Partners LP	11,024.61	21,893.20	(10,868.59)	
01/18/13	10/03/13	180.00	Verizon Communications	8,450.90	7,626.60	824.30	
Various	11/05/13	350 00	Atlas Pipeline Partners LP	12,909.09	11,644.52	1,264.57	
01/18/13	11/05/13	100.00	Atlas Pipeline Partners LP	3,688.31	3,321.99	366.32	
02/25/13	11/05/13	100.00	Atlas Pipeline Partners LP	3,688.31	3,334.53	353.78	
Various	11/05/13	250 00	Buckeye Partners LP	17,015.75	13,506.09	3,509.66	
Various	11/05/13	757.00	Westwood Equity LP	11,281.25	11,082.48	198.77	
05/09/13	11/05/13	193 00	Westwood Equity LP	2,876.20	2,748.84	127.36	
05/09/13	11/05/13	300 00	Westwood Equity LP	4,470.77	4,272.81	197.96	
Various	11/05/13	325 00	Markwest Energy Partners LP	23,787.14	17,883.92	5,903.22	
09/26/13	11/05/13	1,000 00	Nustar GP Holdings LLC	24,740.62	21,958.95	2,781.67	
Various	11/05/13	1,200 00	PVR Partners LP	30,110.53	28,121.41	1,989.12	
Various	11/06/13	200.00	Boardwalk Pipeline Partners	5,685.51	5,307.74	377.77	
01/18/13	11/06/13	100.00	Boardwalk Pipeline Partners	2,842.76	2,682.99	159.77	
01/18/13	11/06/13	257 00	Boardwalk Pipeline Partners	7,305.88	6,895.28	410.60	
02/25/13	11/06/13	193.00	Boardwalk Pipeline Partners	5,486.52	5,116.41	370.11	
09/27/13	11/06/13	49 00	USA Compression Partners	1,184.18	1,174.25	9.93	
Various	11/06/14	500 00	Williams Partners	24,891.12	25,051.97	(160.85)	
09/20/13	11/07/13	50 00	Atlas Resource Partners	991.88	1,068.83	(76.95)	
09/20/13	11/07/13	500 00	Atlas Resource Partners	10,065.87	10,272.68	(206.81)	
09/20/13	11/07/13	700 00	Atlas Resource Partners	13,886.41	14,759.34	(872.93)	
05/09/13	11/07/13	93.00	Crestwood Mid LP	1,947.49	1,947.49	-	
05/09/13	11/07/13	141 00	Crestwood Mid LP	2,952.64	2,952.64	-	
05/09/13	11/07/13	366.00	Crestwood Mid LP	7,664.29	9,131.46	(1,467.17)	
05/09/13	11/07/13	400 00	Crestwood Mid LP	8,376.27	8,449.27	(73.00)	
Various	11/07/13	700.00	USA Compressio Partners	17,071.61	16,712.11	359.50	
10/18/13	11/07/13	74 00	USA Compressio Partners	1,804.71	1,736.39	68.32	
Various	11/12/13	450 00	ABB Ltd ADR	11,263.35	9,497.07	1,766.28	
01/18/13	12/03/13	325.00	CA Inc	10,644.69	7,907.22	2,737.47	
11/29/13	12/03/13	4 00	Royal Dutch Shell Inc	73.49	73.49	-	
Various	02/19/14	32 57	Emerging Mkts Core Equity Port	607.79	626.36	(18.57)	
Various	02/19/14	1,032 97	Emerging Mkts Oppty Fd Cl I	9,441.32	10,489.15	(1,047.83)	

The Burkland Foundation
Realized Gain (Loss) Schedule
Form 990 Part IV (Detail)
FYE 9/30/14

Date Purchased	Date Sold	Shares	Description	Proceeds	Cost Basis	Realized Gain (Loss)	
						Short Term	Long Term
01/18/13	02/13/14	250 00	Microsoft corp	9,428 39	6,787 47		2,640 92
01/18/13	02/13/14	220.00	Waste Management Inc	9,483.88	7,772 60		1,711 28
01/18/13	02/19/14	2,558 93	Emerging Mkts Core Equity Port	47,749 54	53,328 00		(5,578 46)
01/18/13	02/19/14	2,873 56	Emerging Mkts Oppty Fd Cl I	26,264 36	29,250 74		(2,986.38)
01/18/13	02/24/14	0 38	Verizon Communications	17 37	-		17.37
01/18/13	02/25/14	0 91	Vodafone Group New ADR	37.13	43 03		(5 90)
02/24/14	02/26/14	164.00	Verizon communications	7,589 04	7,890 86	(301 82)	
06/26/13	02/27/14	60.00	Roche Hldg Ltd Spon ADR	2,309 03	1,815 00	494 03	
Various	02/27/14	177 27	Vodafone Group New ADR	7,307.71	9,186 24	(1,878.53)	
01/18/13	02/27/14	290 00	Roche Hldg Ltd Spon ADR	11,160 29	7,719.80		3,440 49
01/18/13	02/27/14	62 73	Vodafone Group New ADR	2,585 80	2,969 30		(383 50)
01/18/13	02/27/14	100 00	Vodafone Group New ADR	4,122 30	4,733 67		(611 37)
03/26/14	04/07/14	157 00	USA Gold & Precious Metals	2,173 84	2,118 49	55.35	
03/26/14	04/07/14	343 00	USA Gold & Precious Metals	4,749 22	4,628 30	120 92	
03/26/14	04/07/14	2,000 00	USA Gold & Precious Metals	27,692 23	26,987 16	705 07	
11/07/13	04/07/14	150 00	Tesoro Corp	7,397 86	7,291 45	106.41	
01/18/13	04/07/14	150 00	Tesoro Corp	7,397 86	6,328 48		1,069.38
Various	05/19/14	500.00	Southwestern Energy Co	22,490 55	18,217 90	4,272 65	
06/26/13	05/22/13	100 00	Lowes Companies Inc	4,542.66	4,047 99	494 67	
Various	05/22/14	135 00	Sygenta AG ADR	10,493 88	10,949 05	(455 17)	
Various	05/27/14	720 00	Westport Innovation	10,793.32	15,700.50	(4,907.18)	
03/20/13	05/22/14	300 00	Lowes Companies Inc	13,627 99	11,609 97		2,018 02
Various	05/22/14	100 00	Sygenta AG ADR	7,773.25	8,466 00		(692 75)
03/20/13	05/22/14	15 00	Sygenta AG ADR	1,165 99	1,282 05		(116.06)
01/18/13	05/27/14	280.00	Westport Innovation	4,197.40	7,599.17		(3,401 77)
11/07/13	05/30/14	150 00	Patterson UTI Energy	4,996 95	3,601 45	1,395 50	
Various	06/09/14	1,350.00	Telefonica Brasil ADR	27,665.44	29,309.30	(1,643.86)	
01/18/13	05/30/14	100 00	Patterson UTI Energy	3,331.30	1,915.00		1,416.30
01/18/13	05/30/14	300 00	Patterson UTI Energy	9,993.90	5,745.00		4,248.90
Various	07/17/14	300 00	Timken Company	14,334.31	11,030 97	3,303 34	
Various	07/25/14	1,000 00	Alcoa Inc	16,690.68	8,382.90	8,307.78	
01/18/13	07/01/14	0 57	Twenty Seven Energy	14 12	8 10		6 02
Various	07/17/14	200 00	Timken Company	9,556 21	7,286.59		2,269 62

The Burkland Foundation
Realized Gain (Loss) Schedule
Form 990 Part IV (Detail)
FYE 9/30/14

Date Purchased	Date Sold	Shares	Description	Proceeds	Cost Basis	Realized Gain (Loss)	
						Short Term	Long Term
05/22/14	08/12/14	400.00	Education Management	503.35	800.64	(297.29)	
05/22/14	08/12/14	549.00	Education Management	690.84	1,098.88	(408.04)	
05/22/14	08/12/14	700.00	Education Management	880.85	1,401.13	(520.28)	
05/22/14	08/12/14	1,706.00	Education Management	2,146.76	3,414.75	(1,267.99)	
05/22/14	08/12/14	2,200.00	Education Management	2,768.39	4,403.55	(1,635.16)	
				<u>650,904.19</u>	<u>629,842.09</u>	<u>15,999.99</u>	<u>5,062.11</u>

Realized Gain (Loss) Summary				
	Proceeds	Cost Basis	Short Term	Long Term
Short Term	482,997.11	466,997.12	15,999.99	-
Long Term	167,907.08	162,844.97	-	5,062.11
Totals	<u>650,904.19</u>	<u>629,842.09</u>	<u>15,999.99</u>	<u>5,062.11</u>

Part II, Line 10b (990-PF) - Investments - Corporate Stock

Description		599,312		872,045		636,580		1,008,470	
		Num Shares/ Face Value	Book Value Beg of Year	Book Value End of Year	FMV Beg of Year	FMV End of Year			
1	EQUITIES		319,714	835,552	359,647	974,850			
2	MUTUAL FUNDS		93,068	36,493	86,975	33,620			
3	MLP		186,530	0	189,958	0			

Part VIII, Line 1 (990-PF) - Compensation of Officers, Directors, Trustees and Foundation Managers

	Name	Check "X" if Business	Street	City	State	Zip Code	Foreign Country	Title	Avg Hrs Per Week	Compensation	Benefits	Expense Account
1	William S Burkland		PO Box 467	Ligonier	PA	15658		Chairman				
2	Pamela T Burkland		PO Box 467	Ligonier	PA	15658		Board Member				
3	W Elliott Burkland		PO Box 467	Ligonier	PA	15658		Board Member				
4	Stewart A Burkland		PO Box 467	Ligonier	PA	15658		Board Member				
5	Ian T Burkland		PO Box 467	Ligonier	PA	15658		Board Member				