Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

▶ Do not enter Social Security numbers on this form as it may be made public.

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

OMB No 1545-0052

2013

Open to Public Inspection

For calendar year 2013 or tax year beginning NOV 1, 2013 , and ending OCT 31, 2014

Name of foundation: THE LOYOLA FOUNDATION, INC.

A Employer identification number: 52-0781255

Number and street (or P O box number if mail is not delivered to street address): 10335 DEMOCRACY LANE — Room/suite: 202

B Telephone number: 571-435-9401

City or town, state or province, country, and ZIP or foreign postal code: FAIRFAX, VA 22030

C If exemption application is pending, check here ▶ ☐

G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ 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: [X] 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*) ▶$ 43,546,673.

J Accounting method: ☐ Cash ☐ Accrual [X] Other (specify) MODIFIED CASH (*Part I, column (d) must be on cash basis.*)

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐

Part I **Analysis of Revenue and Expenses** (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))

			(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc., received			N/A	
	2	Check ▶ [X] if the foundation is not required to attach Sch B				
	3	Interest on savings and temporary cash investments				
	4	Dividends and interest from securities	662,425.	662,425.		STATEMENT 1
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	1,085,353.			
	b	Gross sales price for all assets on line 6a 8,648,581.				
	7	Capital gain net income (from Part IV, line 2)		1,085,353.		
	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)				
	11	Other income	1,159,976.	1,159,976.		STATEMENT 2
	12	**Total.** Add lines 1 through 11	2,907,754.	2,907,754.		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	129,996.	32,499.		97,497.
	14	Other employee salaries and wages	59,400.	14,850.		44,550.
	15	Pension plans, employee benefits	52,512.	13,128.		39,384.
	16a	Legal fees STMT 3	36,280.	36,280.		0.
	b	Accounting fees STMT 4	45,120.	22,560.		22,560.
	c	Other professional fees STMT 5	201,792.	192,191.		9,601.
	17	Interest	8.	0.		0.
	18	Taxes STMT 6	25,598.	0.		0.
	19	Depreciation and depletion	29,167.	0.		
	20	Occupancy	31,713.	0.		31,713.
	21	Travel, conferences, and meetings	184,101.	40,361.		121,083.
	22	Printing and publications				
	23	Other expenses STMT 7	60,305.	1,621.		58,714.
	24	**Total operating and administrative expenses.** Add lines 13 through 23	855,992.	353,490.		425,102.
	25	Contributions, gifts, grants paid	1,581,165.			1,581,165.
	26	**Total expenses and disbursements.** Add lines 24 and 25	2,437,157.	353,490.		2,006,267.
	27	Subtract line 26 from line 12:				
	a	Excess of revenue over expenses and disbursements	470,597.			
	b	**Net investment income** (if negative, enter -0-)		2,554,264.		
	c	**Adjusted net income** (if negative, enter -0-)			N/A	

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10-10-13 LHA For Paperwork Reduction Act Notice, see instructions.

Part II Balance Sheets (Attached schedules and amounts in the description column should be for end-of-year amounts only)		Beginning of year (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	1,651,749.	3,806,215.	3,806,215.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges	19,769.	49,877.	49,877.
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock STMT 9	38,270,386.	38,878,788.	38,878,788.
	c Investments - corporate bonds			
	11 Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other			
	14 Land, buildings, and equipment: basis ▶ 961,538.			
	Less accumulated depreciation STMT 10▶ 149,745.	835,107.	811,793.	811,793.
	15 Other assets (describe ▶)			
	16 **Total assets** (to be completed by all filers - see the instructions. Also, see page 1, item I)	40,777,011.	43,546,673.	43,546,673.
Liabilities	17 Accounts payable and accrued expenses	30,049.	20,000.	
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
	23 **Total liabilities** (add lines 17 through 22)	30,049.	20,000.	
Net Assets or Fund Balances	**Foundations that follow SFAS 117, check here** ▶ [X] **and complete lines 24 through 26 and lines 30 and 31.**			
	24 Unrestricted	40,746,962.	43,526,673.	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ [ ] **and complete lines 27 through 31.**			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg., and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 **Total net assets or fund balances**	40,746,962.	43,526,673.	
	31 **Total liabilities and net assets/fund balances**	40,777,011.	43,546,673.	

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	40,746,962.
2	Enter amount from Part I, line 27a	2	470,597.
3	Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 8	3	2,309,114.
4	Add lines 1, 2, and 3	4	43,526,673.
5	Decreases not included in line 2 (itemize) ▶	5	0.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	43,526,673.

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 14	P	VARIOUS	10/31/14
b	CAPITAL GAIN DISTRIBUTIONS	P	VARIOUS	12/31/13
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	7,772,008.		7,563,228.	208,780.
b	876,573.			876,573.
c				
d				
e				

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

	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a				208,780.
b				876,573.
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** 1,085,353.

3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):
If gain, also enter in Part I, line 8, column (c).
If (loss), enter -0- in Part I, line 8 **3** N/A

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	1,533,392.	38,832,227.	.039488
2011	1,798,538.	37,263,299.	.048266
2010	1,849,127.	36,029,605.	.051322
2009	1,273,067.	36,753,015.	.034638
2008	2,080,355.	33,141,248.	.062772

2	**Total** of line 1, column (d)	2	.236486
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	.047297
4	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	41,418,159.
5	Multiply line 4 by line 3	5	1,958,955.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	25,543.
7	Add lines 5 and 6	7	1,984,498.
8	Enter qualifying distributions from Part XII, line 4	8	2,006,267.

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.

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 ▶ [X] and enter 1% of Part I, line 27b		1	25,543.
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	25,543.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
5	**Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter -0-		5	25,543.
6	Credits/Payments:			
a	2013 estimated tax payments and 2012 overpayment credited to 2013	6a 55,200.		
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	55,200.
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	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶		10	29,657.
11	Enter the amount of line 10 to be: **Credited to 2014 estimated tax** ▶ 29,657. **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?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)?	1b		X
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.			
c	Did the foundation file **Form 1120-POL** for this year?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: **(1)** On the foundation. ▶ $ 0. **(2)** On foundation managers. ▶ $ 0.			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ 0.			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities.*	2		X
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year? N/A	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		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?	6	X	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col. (c), and Part XV*	7	X	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ DC,VA			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by *General Instruction G? If "No," attach explanation* SEE STATEMENT 11	8b		X
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? *If "Yes," complete Part XIV*	9		X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X

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

			Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ▶ LOYOLAFOUNDATION.ORG

14 The books are in care of ▶ THE FOUNDATION Telephone no. ▶ 571-435-9401

Located at ▶ 10335 DEMOCRACY LANE, FAIRFAX, VA ZIP+4 ▶ 22030

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

			Yes	No
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?	16		X
	See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ▶			

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

			Yes	No
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			
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)?	1b		X
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?	1c		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):			
a	At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? ☐ Yes ☒ No			
	If "Yes," list the years ▶ ____, ____, ____, ____			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement - see instructions.) N/A	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. ▶ ____, ____, ____, ____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2013 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969; **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013.)* N/A	3b		
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))? ☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? ☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

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

Organizations relying on a current notice regarding disaster assistance check here ▶ ☐

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? N/A ☐ Yes ☐ No

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b** No: X

If "Yes" to 6b, file Form 8870.

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? N/A **7b**

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

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

(a) Name and address	**(b)** Title, and average hours per week devoted to position	**(c)** Compensation (**If not paid, enter -0-**)	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
SEE STATEMENT 12		129,996.	5,200.	0.

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

(a) Name and address of each employee paid more than $50,000	**(b)** Title, and average hours per week devoted to position	**(c)** Compensation	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
ANNAMARIE GLAIZE - 6641 WAKEFIELD DRIVE, APT 801, ALEXANDRIA, VA 22307	ASSISTANT 40.00	59,400.	1,782.	0.

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. If none, enter "NONE."

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over $50,000 for professional services ▶		0

Part IX-A **Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 SEE STATEMENT 13	2,006,267.
2	
3	
4	

Part IX-B **Summary of Program-Related Investments**

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 N/A	
2	
All other program-related investments. See instructions. 3	
Total. Add lines 1 through 3 ▶	0.

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	38,352,612.
b	Average of monthly cash balances		1b	2,834,610.
c	Fair market value of all other assets		1c	861,670.
d	**Total** (add lines 1a, b, and c)		1d	42,048,892.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e 0.		
2	Acquisition indebtedness applicable to line 1 assets		2	0.
3	Subtract line 2 from line 1d		3	42,048,892.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)		4	630,733.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4		5	41,418,159.
6	**Minimum investment return.** Enter 5% of line 5		6	2,070,908.

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	2,070,908.
2a	Tax on investment income for 2013 from Part VI, line 5	2a 25,543.		
b	Income tax for 2013. (This does not include the tax from Part VI.)	2b		
c	Add lines 2a and 2b		2c	25,543.
3	Distributable amount before adjustments. Subtract line 2c from line 1		3	2,045,365.
4	Recoveries of amounts treated as qualifying distributions		4	0.
5	Add lines 3 and 4		5	2,045,365.
6	Deduction from distributable amount (see instructions)		6	0.
7	**Distributable amount** as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1		7	2,045,365.

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	2,006,267.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	2,006,267.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	25,543.
6	**Adjusted qualifying distributions** Subtract line 5 from line 4	6	1,980,724.

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				2,045,365.
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only			0.	
b Total for prior years: ____ , ____ , ____		0.		
3 Excess distributions carryover, if any, to 2013:				
a From 2008 434,337.				
b From 2009				
c From 2010 93,069.				
d From 2011				
e From 2012				
f **Total** of lines 3a through e	527,406.			
4 Qualifying distributions for 2013 from Part XII, line 4: ▶ $ 2,006,267.				
a Applied to 2012, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2013 distributable amount				2,006,267.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a).)	39,098.			39,098.
6 **Enter the net total of each column as indicated below:**				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	488,308.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2012. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2013. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2014				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7	395,239.			
9 **Excess distributions carryover to 2014.** Subtract lines 7 and 8 from line 6a	93,069.			
10 Analysis of line 9:				
a Excess from 2009				
b Excess from 2010 93,069.				
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

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

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

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

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

1 **Information Regarding Foundation Managers:**

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

NONE

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

NONE

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

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

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

A.G. MCCARTHY, IV, SECRETARY, THE LOYOLA FOUNDATION, 571-435-9401
10335 DEMOCRACY LANE, SUITE 202, FAIRFAX, VA 22030

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

SEE ATTACHED COPY OF GRANT APPLICATION AND INSTRUCTIONS

c Any submission deadlines:

SEE ATTACHED COPY OF GRANT APPLICATION AND INSTRUCTIONS

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

SEE ATTACHED COPY OF GRANT APPLICATION AND INSTRUCTIONS

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
SEE ATTACHED CONTRIBUTIONS/GRANTS SCHEDULE - STATEMENT 15	NONE	RELIGIOUS ORGANIZATIONS	ASSISTING CATHOLIC MISSIONARY ACTIVITIES	1,581,165.
Total			▶ **3a**	1,581,165.
b *Approved for future payment* NONE				
Total			▶ **3b**	0.

Form **990-PF** (2013)

323611
10-10-13

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		(e)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	Related or exempt function income
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	662,425.	
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			16	1,159,976.	
8 Gain or (loss) from sales of assets other than inventory			18	1,085,353.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)		0.		2,907,754.	0.

13 Total. Add line 12, columns (b), (d), and (e) 13 2,907,754.

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

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes).
	N/A

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

			Yes	No
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(1)		X
	(2) Other assets	1a(2)		X
b	Other transactions:			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
	(3) Rental of facilities, equipment, or other assets	1b(3)		X
	(4) Reimbursement arrangements	1b(4)		X
	(5) Loans or loan guarantees	1b(5)		X
	(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X

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.

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements
		N/A	

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
N/A		

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

Signature of officer or trustee | Date 01/09/2015 | Title EXECUTIVE DIRECTOR

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

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self- employed	PTIN
ALLAN E. ROBERTS, CPA, MST		12/05/14		P00037176
Firm's name ▶ LIPTZ, ROBERTS, MARQUEZ, ET. AL, CHTD.			Firm's EIN ▶ 52-0939448	
Firm's address ▶ 5530 WISCONSIN AVE, SUITE 1100 CHEVY CHASE, MD 20815-4330			Phone no. (301)657-2900	

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 1

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
DIVIDEND INCOME	662,425.	0.	662,425.	662,425.	
TO PART I, LINE 4	662,425.	0.	662,425.	662,425.	

FORM 990-PF OTHER INCOME STATEMENT 2

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
PARTNERSHIP INCOME	1,159,976.	1,159,976.	
TOTAL TO FORM 990-PF, PART I, LINE 11	1,159,976.	1,159,976.	

FORM 990-PF LEGAL FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
MEYNER & LANDIS	36,280.	36,280.		0.
TO FM 990-PF, PG 1, LN 16A	36,280.	36,280.		0.

FORM 990-PF ACCOUNTING FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LIPTZ, ROBERTS & MARQUEZ	45,120.	22,560.		22,560.
TO FORM 990-PF, PG 1, LN 16B	45,120.	22,560.		22,560.

FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT ADVISORY FEES	32,406.	32,406.		0.
INVESTMENT MANAGEMENT FEES	159,785.	159,785.		0.
CONSULTANTS	9,601.	0.		9,601.
TO FORM 990-PF, PG 1, LN 16C	201,792.	192,191.		9,601.

FORM 990-PF TAXES STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FEDERAL EXCISE TAXES	25,543.	0.		0.
PENALTIES	55.	0.		0.
TO FORM 990-PF, PG 1, LN 18	25,598.	0.		0.

FORM 990-PF OTHER EXPENSES STATEMENT 7

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
OFFICE EXPENSE	45,537.	0.		45,537.
INSURANCE	6,243.	150.		6,123.
PAYROLL SERVICE FEE	5,885.	1,471.		4,414.
WEBSITE HOSTING	2,640.	0.		2,640.
TO FORM 990-PF, PG 1, LN 23	60,305.	1,621.		58,714.

FORM 990-PF OTHER INCREASES IN NET ASSETS OR FUND BALANCES STATEMENT 8

DESCRIPTION	AMOUNT
UNREALIZED GAINS ON MARKETABLE SECURITIES	2,309,114.
TOTAL TO FORM 990-PF, PART III, LINE 3	2,309,114.

FORM 990-PF CORPORATE STOCK STATEMENT 9

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
100 COLLINS CAPITAL	81,148.	81,148.
100 PERENNIAL REAL ESTATE	1,430,361.	1,430,361.
100 PERMAL PRIVATE EQUITY	1,756,209.	1,756,209.
100 SILVER CREEK	807,846.	807,846.
100 TUCKERBROOK	1,175,577.	1,175,577.
100 SIGULER GUFF	4,914,076.	4,914,076.
213,122.57 HC CAPITAL TRUST COMMODITY	2,137,619.	2,137,619.
362,652.57 HC CAPITAL TRUST FIXED INCOME OPPORTUNITY	2,730,774.	2,730,774.
119,894.46 VANGUARD FIXED INCOME SECS FD	0.	0.
19,344.75 HC CAPITAL TRUST INST SMALL CAP EQUITY	330,989.	330,989.
124,556.04 HC CAPITAL TRUST EMERGING MKTS	2,402,686.	2,402,686.
468,081.79 HC CAPITAL TRUST INSTL INTL EQUITY	5,523,365.	5,523,365.
180,043.79 HC CAPITAL TRUST INSTL GROWTH EQUITY	3,114,757.	3,114,757.
139,473.96 HC CAPITAL TRUST INSTL VALUE EQUITY	2,090,715.	2,090,715.
133,221.31 HC CAPITAL TRUST REAL ESTATE SECURITIES	452,952.	452,952.
146,302.45 HC CAPITAL TRUST US CORPORATE FIXED INCOME	1,492,285.	1,492,285.
167,285.53 HC CAPITAL TRUST US GOVERNMENT FIXED INCOME	1,674,528.	1,674,528.
163,028.54 HC CAPITAL TRUST US MORTGAGE/ASSET	1,610,722.	1,610,722.
974.96 H CALLAGHAN ABSO RETN OFFSHR FD II	1,155,181.	1,155,181.
1,305.95 H CALLAGHAN TOT RETN OFFSHR FD II	1,605,936.	1,605,936.
236,973.44 HC CAPITAL TRUST THE INFLATION	2,391,062.	2,391,062.
TOTAL TO FORM 990-PF, PART II, LINE 10B	38,878,788.	38,878,788.

FORM 990-PF DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT STATEMENT 10

DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
BUILDING	639,783.	95,696.	544,087.
LAND	240,332.	0.	240,332.
DESK CREDENZA KEYBOARD HUTCH MAHOGANY (NATIONAL BUSINESS FURNITURE)	2,859.	2,278.	581.
TUFTED HIGH BACK CHAIR OXBLOOD (NATIONAL BUSINESS FURNITURE)	593.	474.	119.
QUEEN ANN TABLE 42" ROUND MAHOGANY (NATIONAL BUSINESS FURNITURE)	627.	502.	125.
2 DRAWER LATERAL FILE MAHOGANY (NATIONAL BUSINESS FURNITURE)	762.	609.	153.
72" H TRADITIONAL BOOKCASE MAHOGANY (NATIONAL BUSINESS FURNITURE)	593.	474.	119.
2 CAPTAIN CHAIRS (NATIONAL BUSINESS FURNITURE)	220.	173.	47.
QUICKBOOK 2009 PRO (DIGITAL ARCHITECTS)	540.	540.	0.
PLANTRONICS SUPRA PLUS CS351N WIRELESS HEADSET	436.	436.	0.
2 ADOBE ACROBAT PRO V.9 (DIGITAL ARCHITECTS)	900.	900.	0.
XEROX PHASER PRINTER (DIGITAL ARCHITECTS)	1,573.	1,573.	0.
2 DELL WORKSTATION OPTI (DIGITAL ARCHITECTS)	2,869.	2,869.	0.
PHONES (SPEAKEASY)	1,616.	1,616.	0.
DELL LATITUDE E5500 (DIGITAL ARCHITECTS)	4,928.	4,928.	0.
CARPET (THE CARPET COMPANY)	6,884.	5,407.	1,477.
2 NOTTINGDALE SAND SHOWOOD ACCENT CHAIRS (REGENCY)	1,727.	1,358.	369.
5 YEAR MFS WARRANTY FOR CHAIRS (REGENCY)	210.	210.	0.
POSTURED DESK (FURNITURE MEDIC)	500.	409.	91.
IMAC 20""/2.66/SD (APPLE STORE)	1,374.	1,374.	0.
CANON PIXMA MP620 ALL-IN-ONE (APPLE STORE)	150.	150.	0.
MICROSOFT OFFICE MAC (APPLE STORE)	135.	135.	0.
APPLE FOR MAC (APPLE STORE)	169.	169.	0.
TRADITIONAL TWO DRAWER LATERAL FILE, NBF	973.	660.	313.
TRADITIONAL MAHOGANY TWO DRAWER LATERAL FILE, NBF	917.	622.	295.

FRAMES, TOTAL FRAMING FAIRFAX	225.	152.	73.
NETGEAR 16-PORT GB SWITCH, MICRO CENTER	241.	228.	13.
DELL OPTIPLEX 380SFF, DIGITAL ARCHITECTS	1,472.	1,225.	247.
SONY EBISFX LAPTOP, COSTCO	949.	823.	126.
DELL BATTERY FOR LOYOLA02 MACHINE, DIGITAL ARCHITECTS	235.	192.	43.
(2) 25" DEEP 4DR LETTER FILE, OFFICE DEPOT	357.	242.	115.
HVAC, KRAFFT A/C	18,745.	9,375.	9,370.
STACK FOLD, CHURCH4LESS	228.	146.	82.
DELL T310 SERVER (GREAT AMERICA)	6,656.	5,102.	1,554.
SOFTWARES (DIGITAL ARCHITECTS)	1,297.	1,297.	0.
SOFTWARES QUICKBOOKS (DIGITAL ARCHITECTS)	1,284.	963.	321.
SOFTWARE (PROACTIVE PERFORMANCE)	8,000.	4,445.	3,555.
SONIC POINT NI DUAL BAND	701.	269.	432.
WEBSITE UPDATE	3,625.	846.	2,779.
DELL OPTIPLEX 7010, DIGITAL ARCHITECTS	5,853.	878.	4,975.
TOTAL TO FM 990-PF, PART II, LN 14	961,538.	149,745.	811,793.

FORM 990-PF EXPLANATION CONCERNING PART VII-A, LINE 8B STATEMENT 11

EXPLANATION

DC & VA DO NOT REQUIRE THE FILING OF FORM 990.

FORM 990-PF PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS STATEMENT 12

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN-SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
ALBERT G. MCCARTHY IV 10335 DEMOCRACY LANE, SUITE 202 FAIRFAX, VA 22030-2535	SECRETARY/TRUSTEE 40.00	129,996.	5,200.	0.
DENISE M. HATTLER 14 INVERNESS DRIVE BLUFFTON, SC 29910	TREASURER/TRUSTEE 1.00	0.	0.	0.
DANIEL J. ALTOBELLO 9430 TURNBERRY DRIVE POTOMAC, MD 20854	TRUSTEE 1.00	0.	0.	0.
KATHLEEN D.H. CARR 162 SOUTH RIVER ROAD FRONT ROYAL, VA 22630	TRUSTEE 1.00	0.	0.	0.
ANDREA HATTLER-BRAMSON 4419 BROOKSIDE DRIVE ALEXANDRIA, VA 22312	PRESIDENT/TRUSTEE 1.00	0.	0.	0.
HILARY A. HATTLER 100 CALLE DEL MUELLE #3801 SAN JUAN, PUERTO RICO 00901	TRUSTEE 1.00	0.	0.	0.
JOHN N. MALYSKA MEYNER & LANDIS GATEWAY 1, STE 2500 NEWARK, NJ 07102-5311	VICE PRES/TRUSTEE 1.00	0.	0.	0.
THEODORE CARDINAL MCCARRICK 4900 LASALLE AVENUE HYATTSVILLE, MD 20782-3302	TRUSTEE 1.00	0.	0.	0.
RAYMOND W. MERRITT, ESQ. WILLKIE FARR & GALLAGHER, 787 SEVENTH AVE NEW YORK, NY 10019-6099	TRUSTEE 1.00	0.	0.	0.
REV. WILLIAM J. BYRON, S.J. ST. JOSEPH'S UNIVERSITY 261 CITY AVENUE MARION STATION, PA 19066-1835	TRUSTEE 1.00	0.	0.	0.

AMY HATTLER-PAGE 7360 BENT GRASS DRIVE WINTER HAVEN, FL 33884-4833	TRUSTEE 1.00	0.	0.	0.
WILLIAM J. FIORE, ESQ. MEYNER & LANDIS GATEWAY1, STE 2500 NEWARK, NJ 07102-5311	TRUSTEE 1.00	0.	0.	0.
DIANA HATTLER MCDONOUGH 1141 TIMBER LANE FRISCO, TX 75034-1742	TRUSTEE 1.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		129,996.	5,200.	0.

FORM 990-PF SUMMARY OF DIRECT CHARITABLE ACTIVITIES STATEMENT 13

ACTIVITY ONE

ASSISTANCE TO ROMAN CATHOLIC MISSIONARY ACTIVITIES, PRIMARILY IN DEVELOPING COUNTRIES. ASSISTING OVER 150 CATHOLIC-RELATED ORGANIZATIONS WORLDWIDE. TOTAL GRANTS = $1,581,165

	EXPENSES
TO FORM 990-PF, PART IX-A, LINE 1	2,006,267.

LOYOLA FOUNDATION
FYE 10/31/2014

PART IV - CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

SALE OF INVESTMENTS - CAPITAL GAINS/LOSSES

Description	Date Sold	Sale Price	Basis	Gain (Loss)
DEUTCHE BANK #652897				
HC CAPITAL TRUST INSTITUTIONAL INT'L	11/26/13	300,000.00	268,696.96	31,303.04
HC CAPITAL TRUST INSTL GROWTH EQUITY	12/26/13	250,000.00	241,043.38	8,956.62
HC CAPITAL TRUST INSTITUTIONAL INT'L	12/26/13	325,000.00	310,230.20	14,769.80
HC CAPITAL TRUST INST SMALL CAP EQUITY	12/26/13	160,000.00	125,849.86	34,150.14
HC CAPITAL TRUST INSTL VALUE EQUITY FD	12/26/13	50,000.00	48,354.80	1,645.20
HC CAPITAL TRUST INSTL GROWTH EQUITY	01/07/14	90,000.00	79,211.61	10,788.39
HC CAPITAL TRUST INSTITUTIONAL INT'L	01/07/14	120,000.00	115,790.54	4,209.46
HC CAPITAL TRUST INSTL VALUE EQUITY FD	01/07/14	70,000.00	68,569.23	1,430.77
HC CAPITAL TRUST COMMODITY RELATED SEC	01/07/14	50,000.00	60,953.73	(10,953.73)
H. CALLAGHAN TOT RETN OFFSHR FD II	01/03/14	500,000.00	500,000.00	0.00
HC CAPITAL TRUST FIXED INCOME OPPORTUNITY	03/07/14	120,000.00	123,937.01	(3,937.01)
HC CAPITAL TRUST US GOVERNMENT FIXED INC.	03/07/14	60,000.00	61,975.26	(1,975.26)
HC CAPITAL TRUST US CORPORATE FIXED INC.	03/07/14	50,000.00	53,081.62	(3,081.62)
HC CAPITAL TRUST US MORTGAGE/ASSET	03/07/14	50,000.00	52,093.27	(2,093.27)
HC CAPITAL TRUST REAL ESTATE SECURITIES	03/28/14	20,000.00	18,461.54	1,538.46
HC CAPITAL TRUST COMMODITY RELATED SEC	03/28/14	60,000.00	70,290.38	(10,290.38)
VANGUARD FIXED INCOME SECS FD	04/03/14	1,567,481.70	1,551,412.23	16,069.47
VANGUARD FIXED INCOME SECS FD	04/11/14	1,584,397.04	1,501,638.51	82,758.53
HC CAPITAL TRUST EMERGING MKTS	05/15/14	100,000.00	101,480.08	(1,480.08)
HC CAPITAL TRUST THE INFLATION	05/15/14	800,000.00	785,964.50	14,035.50
HC CAPITAL TRUST FIXED INCOME OPPORTUNITY	06/05/14	830,000.00	816,719.42	13,280.58
HC CAPITAL TRUST INSTL GROWTH EQUITY	06/24/14	80,000.00	79,513.69	486.31
HC CAPITAL TRUST INSTITUTIONAL INT'L	06/24/14	205,000.00	196,072.23	8,927.77
HC CAPITAL TRUST EMERGING MKTS	06/24/14	200,000.00	194,319.85	5,680.15
HC CAPITAL TRUST INSTL VALUE EQUITY FD	06/24/14	27,500.00	26,695.21	804.79
HC CAPITAL TRUST COMMODITY RELATED SEC	06/24/14	100,000.00	110,873.10	(10,873.10)
WASH SALE ADJUSTMENTS	10/31/14	1,953.90		1,953.90
CLASS ACTION	10/31/14	675.23		675.23
TOTAL STOCK SALE		**7,772,007.87**	**7,563,228.21**	**208,779.66**
TOTAL CAPITAL GAINS (LOSSES)				**208,779.66**
CAPITAL GAIN DISTRIBUTIONS				876,572.52
GRAND TOTAL				**1,085,352.18**

THE LOYOLA FOUNDATION, INC.
CONTRIBUTIONS (GRANTS)
FOR THE YEAR ENDED OCTOBER 31, 2014

	AMOUNT
Academia Maria Reina, PR	8,000
Adelante Project	1,000
Alianza para Un PR sin Drogas	5,000
All Saints Academy, FL	10,000
Apostolic Vicariate of Beni, Bolivia	10,000
Apostolic Vicariate of Beyrouth, Lebanon	10,000
Apostolic Vicariate of Francistown, Botswana	10,000
Apostolic Vicariate of Isiolo, Kenya	10,000
Apostolic Vicariate of Jimma Bonga, Ethiopia	9,600
Apostolic Vicariate of San Jose del Amazonas, Peru	10,000
Archdiocese of Abuja, Nigeria	10,000
Archdiocese of Arequipa, Peru	10,000
Archdiocese of Balantyre, Malawi	10,000
Archdiocese of Cap-Haitien, Haiti	8,050
Archdiocese of Cebu, Philippines	10,000
Archdiocese of Douala, Cameroon	10,000
Archdiocese of Harare, Zimbabwe	10,000
Archdiocese of Jakarta, Indonesia	10,000
Archdiocese of Lilongwe, Malawi	9,975
Archdiocese of Lusaka, Zambia	10,000
Archdiocese of Madras-Myapole, India	5,000
Archdiocese of Manila, Philippines	10,000
Archdiocese of Maputo, Mozambique	7,800
Archdiocese of Mbarara, Uganda	10,000
Archdiocese of Palo, Philippines	10,000
Archdiocese of Pondicherry & Cuddalore, India	7,500
Archdiocese of Pondicherry & Cuddalore, India	9,925
Archdiocese of Tabora, Tanzania	9,650
Archdiocese of Toamisina, Madagascar	7,500
Archdiocese of Tororo, Uganda	9,500
Archdiocese of Vrhbasna/Sarajevo, Bosnia & Herzegovina	10,750
Archdiocese of Washington, DC	10,000
Archdiocese of Washington, DC/ Former Archbishop's Fund	30,000
Arrupe Center St. Joseph's University PA	2,000
ASA	2,000
Associated Alumnae and Alumni of Sacred Heart	1,000
Association Religious Faith & Joy	1,000
Bread for the World Institute	1,000
Canterbury School, CT	1,000
Canterbury School, CT	12,500
Cardinal Felix Foundation, FL	1,000
Carmel of the Incarnation, NY	3,000
Carmelite Monastery, MD	1,000
Casa Manuel Fernandez Juncos, PR	7,000
Cathedral of St Mary of the Assumption, CA	500
Catholic University of America, WDC	1,000
Center For the Study of Church Management	1,000
Subtotal	$ 354,250

THE LOYOLA FOUNDATION, INC.
CONTRIBUTIONS (GRANTS)
FOR THE YEAR ENDED OCTOBER 31, 2014

	AMOUNT
Subtotal from previous page	$ 766,560
Diocese of Kalyan, India	10,000
Diocese of Khunti, India	9,750
Diocese of Kottar, India	10,000
Diocese of Kumbo, Cameroon	10,000
Diocese of Kurnool, India	8,000
Diocese of Kyiv-Zytomyr, Ukraine	10,000
Diocese of Lodwar, Kenya	10,000
Diocese of Lugazi, Uganda	10,000
Diocese of Lugazi, Uganda	9,725
Diocese of Maasin, Philippines	9,865
Diocese of Mamfe, Cameroon	10,000
Diocese of Mananthavady, India	8,050
Diocese of Maralal, Kenya	9,925
Diocese of Marianhill, South Africa	7,500
Diocese of Masaka, Uganda	10,375
Diocese of Masaka, Uganda	10,000
Diocese of Mbeya, Tanzania	9,400
Diocese of Mbinga, Tanzania	6,500
Diocese of Mbinga, Tanzania	4,700
Diocese of Mbulu, Tanzania	9,000
Diocese of Meerut, India	3,600
Diocese of Miao, India	8,000
Diocese of Monze, Zambia	2,100
Diocese of Monze, Zambia	9,750
Diocese of Murang'a, Kenya	10,000
Diocese of Mzuzu, Malawi	9,000
Diocese of Nakuru, Kenya	12,000
Diocese of Nebbi, Uganda	8,300
Diocese of Nellore, India	10,000
Diocese of Nellore, India	7,200
Diocese of Ngong, Kenya	10,000
Diocese of Njombe, Tanzania	10,000
Diocese of Obala, Cameroon	10,000
Diocese of Obuasi, Ghana	10,000
Diocese of Ootacamund, India	11,000
Diocese of Palghat, India	10,000
Diocese of Palyamkottai, India	10,000
Diocese of Phan Thiet, Vietnam	9,000
Diocese of Porto, Portugal	10,000
Diocese of Puerto Plata, Dominican Republic	10,000
Diocese of Puno, Peru	10,000
Diocese of Rajkot, India	10,000
Diocese of San Juan de la Maguana, Dominican Republic	9,750
Diocese of Shimoga, India	8,800
Diocese of Sivigangai, India	10,000
Diocese of Sylhet, Bangladesh	10,000
Subtotal	$ 1,187,850

THE LOYOLA FOUNDATION, INC.
CONTRIBUTIONS (GRANTS)
FOR THE YEAR ENDED OCTOBER 31, 2014

	AMOUNT
Subtotal from previous page	$ 1,187,850
Diocese of Tanga, Tanzania	10,125
Diocese of Thamarasserrry, India	7,830
Diocese of Thukalay, India	9,700
Diocese of Tiruchirapalli, India	1,750
Diocese of Tshumbe, Democratic Republic of the Congo	8,000
Diocese of Tuticoron, India	2,050
Diocese of Ujjain, India	10,000
Diocese of Varanasi, India	7,450
Diocese of Vasai, India	10,000
Diocese of Vellore, India	10,000
Diocese of Vijayawada, India	10,150
Diocese of Zomba, Malawi	6,760
Elizabeth Coalition to House the Homeless, NJ	1,000
Fairfax City Professional Firefighters, VA	500
Fe y Alegria Nicaragua	6,000
Fe y Alegria Nicaragua	5,000
Fordham University, NYC	7,500
Fundación Servicio de los Jesuitas para los Refugiados Colombia	7,000
Georgetown University, DC	1,000
Georgetown University Law Center, DC	5,000
Gesu School	7,000
Glen Ridge Community Fund, NJ	500
Glen Ridge Community Pool, NJ	750
Glen Ridge Educational Foundation, NJ	500
Glen Ridge Music Parents Association, NJ	750
Glen Ridge Volunteer Ambulance Squad, NJ	1,000
Greater Newark Conservancy, NJ	2,000
Helping Hands Ministries, Inc.	1,500
Holy Cross Abbey, VA	1,000
Holy Family Catholic Church, CA	350
Humane Society of Polk County, FL	8,000
Immaculate Conception R C. Church, NJ	2,500
Istituto Per Le Opere Di Relogione	6,000
Kino Border Initiative	7,000
Manhattanville College. NY	1,000
Marillac St. Vincent Family Services, IL	1,000
Maryland Province Society of Jesus	3,000
MDA Puerto Rico	2,500
Mepkin Abbey	1,000
Missionaires Oblates Haiti	8,000
Montclair State University, NJ	5,000
Montclair YMCA, NJ	1,000
Museo de Arte de Ponce, Puerto Rico	5,000
National Center for the Laity, IL	1,000
Newark Public Radio, NJ	500
New Century Dance, CA	1,500
Subtotal	$ 1,384,015

THE LOYOLA FOUNDATION, INC.
CONTRIBUTIONS (GRANTS)
FOR THE YEAR ENDED OCTOBER 31, 2014

	AMOUNT
Subtotal from previous page	$ 1,384,015
New Jersey Institute for Social Justice	1,000
NYU Tisch School of the Arts	2,500
Nurturing Network	1,000
Parkinson's Action Network	1,000
Paulist Press	10,000
PCCI	500
Precious Block Ministry of Reconciliation, IL	1,000
Pregnancy Center of the Low Country, SC	1,000
PSDI, MO	2,000
Queen of Apostles Catholic Church, VA	1,000
Rutgers University	3,500
Salesians of St. John Bosco, NJ	500
Samuel's Library, VA	5,000
Senior Care and Activity Center, NJ	250
Seton Hall Preparatory School, NJ	5,000
Seton Hall University, NJ	4,000
Sisters of Notre Dame, OH	5,000
SOAR!, WDC	1,000
Society of the Sacred Heart, MO	2,000
Sovereign Military Order of Malta	1,000
SPCA Lakeland, FL	2,000
Speak/Up	1,000
St. Ambrose Catholic Church, VA	7,000
St Ambrose Catholic School, VA	1,150
St Cecilia's Catholic Church, CA	500
St. Coletta of Greater Washington	20,000
St. Francis De Sales	1,000
St Gregory the Great Catholic Church, SC	4,000
St. John's Church, NJ	1,000
St. Joseph's Preparatory School, PA	1,000
St Lucy's Church Shrine fo St. Gerard Maiella, NJ	250
St. Luke Institute, MD	8,500
St. Luke's Community Clinic, VA	5,000
St. Matthew's Catholic Church, FL	5,000
St Peter's College, NJ/ William J. Mulcahy Scholarship	50,000
Summit Volunteer First Aid Squad	2,000
Trinitas Health Foundation, NJ	2,000
United Way Front Royal/Warren County	15,000
University of South Carolina Gamecock Club	1,000
USCCB Washington, DC	7,000
Villa Notre Dame	1,000
Volunteers in Medicine, SC	3,000
Washington Jesuit Academy	1,000
Women's Recovery Association, CA	500
WHYSA, FL	6,000
Wildlife Preserves, Inc.	3,000
Total	$ 1,581,165

2013 DEPRECIATION AND AMORTIZATION REPORT

FORM 990-PF PAGE 1 990-PF

Asset No	Description	Date Acquired	Method	Life	Conv	Line No	Unadjusted Cost Or Basis	Bus % Excl	Section 179 Expense	* Reduction In Basis	Basis For Depreciation	Beginning Accumulated Depreciation	Current Sec 179 Expense	Current Year Deduction	Ending Accumulated Depreciation
	BUILDINGS														
17	BUILDING	12/18/08	SL	39.00	MM	16	639,783.				639,783.	79,291.		16,405.	95,696.
	* 990-PF PG 1 TOTAL BUILDINGS						639,783.				639,783.	79,291.		16,405.	95,696.
	FURNITURE & FIXTURES														
19	DESK CREDENZA KEYBOARD HUTCH MAHOGANY (NATIONAL BUSINESS	04/13/09	SL	7.00		16	2,859.				2,859.	1,870.		408.	2,278.
20	TUFTED HIGH BACK CHAIR OXBLOOD (NATIONAL BUSINESS F	04/13/09	SL	7.00		16	593.				593.	389.		85.	474.
21	QUEEN ANN TABLE 42" ROUND MAHOGANY (NATIONAL BUSINESS	04/13/09	SL	7.00		16	627.				627.	412.		90.	502.
22	2 DRAWER LATERAL FILE MAHOGANY (NATIONAL BUSINESS	04/13/09	SL	7.00		16	762.				762.	500.		109.	609.
23	72" H TRADITIONAL BOOKCASE MAHOGANY (NATIONAL BUSINESS	04/13/09	SL	7.00		16	593.				593.	389.		85.	474.
24	2 CAPTAIN CHAIRS (NATIONAL BUSINESS FURNITURE)	04/13/09	SL	7.00		16	220.				220.	142.		31.	173.
33	CARPET (THE CARPET COMPANY)	05/01/09	SL	7.00		16	6,884.				6,884.	4,424.		983.	5,407.
34	2 NOTTINGDALE SAND SHOWOOD ACCENT CHAIRS (REGENCY)	05/15/09	SL	7.00		16	1,727.				1,727.	1,111.		247.	1,358.
35	5 YEAR MFS WARRANTY FOR CHAIRS (REGENCY)	02/12/09	SL	5.00		16	210.				210.	200.		10.	210.
36	POSTURED DESK (FURNITURE MEDIC)	02/12/09	SL	7.00		16	500.				500.	338.		71.	409.
41	TRADITIONAL TWO DRAWER LATERAL FILE, NBF	01/20/10	SL	7.00		16	973.				973.	521.		139.	660.
42	TRADITIONAL MAHOGANY TWO DRAWER LATERAL FILE, NBF	01/20/10	SL	7.00		16	917.				917.	491.		131.	622.
43	FRAMES, TOTAL FRAMING FAIRFAX	01/17/10	SL	7.00		16	225.				225.	120.		32.	152.
48	(2) 25" DEEP 4DR LETTER FILE, OFFICE DEPOT	01/20/10	SL	7.00		16	357.				357.	191.		51.	242.

(D) - Asset disposed

* ITC, Salvage, Bonus, Commercial Revitalization Deduction, GO Zone

2013 DEPRECIATION AND AMORTIZATION REPORT

FORM 990-PF PAGE 1 990-PF

Asset No	Description	Date Acquired	Method	Life	C o n v	Line No	Unadjusted Cost Or Basis	Bus % Excl	Section 179 Expense	* Reduction In Basis	Basis For Depreciation	Beginning Accumulated Depreciation	Current Sec 179 Expense	Current Year Deduction	Ending Accumulated Depreciation
49	HVAC, KRAFFT A/C	11/01/09	SL	10.00		16	18,745.				18,745.	7,500.		1,875.	9,375.
50	STACK FOLD, CHURCH4LESS	05/19/10	SL	7.00		16	228.				228.	113.		33.	146.
	* 990-PF PG 1 TOTAL FURNITURE & FIXTURES						36,420.				36,420.	18,711.		4,380.	23,091.
	MACHINERY & EQUIPMENT														
25	QUICKBOOK 2009 PRO (DIGITAL ARCHITECTS)	03/27/09	SL	3.00		16	540.				540.	540.		0.	540.
26	PLANTRONICS SUPRA PLUS CS351N WIRELESS HEADSET	03/27/09	SL	5.00		16	436.				436.	399.		37.	436.
27	2 ADOBE ACROBAT PRO V.9 (DIGITAL ARCHITECTS)	04/24/09	SL	3.00		16	900.				900.	900.		0.	900.
28	XEROX PHASER PRINTER (DIGITAL ARCHITECTS)	08/25/09	SL	5.00		16	1,573.				1,573.	1,312.		261.	1,573.
29	2 DELL WORKSTATION OPTI (DIGITAL ARCHITECTS)	09/21/09	SL	5.00		16	2,869.				2,869.	2,344.		525.	2,869.
31	PHONES (SPEAKEASY)	01/02/09	SL	5.00		16	1,616.				1,616.	1,561.		55.	1,616.
32	DELL LATITUDE E5500 (DIGITAL ARCHITECTS)	03/13/09	SL	5.00		16	4,928.				4,928.	4,601.		327.	4,928.
37	IMAC 20""/2.66/SD (APPLE STORE)	06/04/09	SL	5.00		16	1,374.				1,374.	1,215.		159.	1,374.
38	CANON PIXMA MP620 ALL-IN-ONE (APPLE STORE)	06/03/09	SL	5.00		16	150.				150.	133.		17.	150.
39	MICROSOFT OFFICE MAC (APPLE STORE)	06/03/09	SL	3.00		16	135.				135.	135.		0.	135.
40	APPLE FOR MAC (APPLE STORE)	06/03/09	SL	3.00		16	169.				169.	169.		0.	169.
44	NETGEAR 16-PORT GB SWITCH, MICRO CENTER	02/08/10	SL	5.00		16	241.				241.	180.		48.	228.
45	DELL OPTIPLEX 380SFF, DIGITAL ARCHITECTS	08/17/10	SL	5.00		16	1,472.				1,472.	931.		294.	1,225.
46	SONY EBISFX LAPTOP, COSTCO	06/24/10	SL	5.00		16	949.				949.	633.		190.	823.

328111
05-01-13

(D) - Asset disposed

* ITC, Salvage, Bonus, Commercial Revitalization Deduction, GO Zone

2013 DEPRECIATION AND AMORTIZATION REPORT

FORM 990-PF PAGE 1 990-PF

Asset No	Description	Date Acquired	Method	Life	Conv	Line No	Unadjusted Cost Or Basis	Bus % Excl	Section 179 Expense	* Reduction In Basis	Basis For Depreciation	Beginning Accumulated Depreciation	Current Sec 179 Expense	Current Year Deduction	Ending Accumulated Depreciation
47	DELL BATTERY FOR LOYOLA02 MACHINE, DIGITAL ARCHITECTS	09/17/10	SL	5.00		16	235.				235.	145.		47.	192.
51	DELL T310 SERVER (GREAT AMERICA)	01/01/11	SL	5.00		16	6,656.				6,656.	3,771.		1,331.	5,102.
52	SOFTWARES (DIGITAL ARCHITECTS)	05/18/11	SL	3.00		16	1,297.				1,297.	1,044.		253.	1,297.
53	SOFTWARES QUICKBOOKS (DIGITAL ARCHITECTS)	07/19/12	SL	3.00		16	1,284.				1,284.	535.		428.	963.
54	SOFTWARE (PROACTIVE PERFORMANCE)	03/12/13	SL	3.00		16	8,000.				8,000.	1,778.		2,667.	4,445.
55	SONIC POINT NI DUAL BAND	12/06/12	SL	5.00		16	701.				701.	129.		140.	269.
56	WEBSITE UPDATE	09/04/13	SL	5.00		16	3,625.				3,625.	121.		725.	846.
57	DELL OPTIPLEX 7010, DIGITAL ARCHITECTS	01/27/14	SL	5.00		16	5,853.				5,853.			878.	878.
	* 990-PF PG 1 TOTAL MACHINERY & EQUIPMENT						45,003.				45,003.	22,576.		8,382.	30,958.
	LAND														
18	LAND	12/18/08	L				240,332.				240,332.			0.	
	* 990-PF PG 1 TOTAL LAND						240,332.				240,332.	0.		0.	0.
	* GRAND TOTAL 990-PF PG 1 DEPR						961,538.				961,538.	120,578.		29,167.	149,745.

328111
05-01-13

(D) - Asset disposed

* ITC, Salvage, Bonus, Commercial Revitalization Deduction, GO Zone

THE LOYOLA FOUNDATION, INC. Application Guidelines and Suggestions

The Loyola Foundation was founded to provide assistance to overseas Roman Catholic mission projects, primarily in developing countries. Requests must be capital in nature and self-sustaining upon completion. The Loyola Foundation gives preference to requests which demonstrate self-help and local support. Special consideration is given to requests that have acquired matching contributions. The Foundation gives preference to requests that, if funded, would complete a project. Requests may be submitted by mail or fax.

If the request meets the Foundation guidelines, a hard copy application form will be sent by mail. Applicants may also email their request to info@loyolafoundation.org or visit our website at www.loyolafoundation.org and download an application form. In order to assist us with processing your request, please submit all correspondence in English.

Applicants must complete one of The Loyola Foundation application forms. The following should be submitted with the application:

1). The written approval of the local Arch/Diocesan Ordinary (Cardinal. Archbishop, or Bishop), in the diocese where the project is located, with his raised imprint seal affixed. This letter must specify that the ordinary has reviewed and approved the specific project. This letter must be the original signed letter. A copy of the ordinary's letter does not satisfy this requirement.

2). A short description of the economic and geographic conditions of the area, and a small map showing the location of the project.

3). For a construction or renovation project, a blueprint and professional cost estimate, prepared by a local contractor, needs to be supplied, as well as *pro forma invoices* for required materials and photographs of the current status of the project.

4).P*ro forma* invoices quoting the cost of a vehicle, equipment, or construction materials, These should be prepared by a local dealership and list the tax and/or shipping costs separately from the base price of the requested items.

5).For a matching grant, information on where the match will be sought and how it will be obtained. If such a grant is approved, payment will not be made until the matching grant has been approved and the approval documentation is received by the Foundation.

Completed applications are considered by the Trustees of the Loyola Foundation at their regularly scheduled meetings, usually in June and December of a given year. Completed application must be received by either March 31st orSeptember 30th to be considered at those meetings. Due to the high volume of submissions, those received towards the end of March or the end of September may not be considered for the respective funding cycle. These requests would be forwarded to the next funding cycle. If the application is a matching grant type, documentation regarding sources of matching support (letters of intent, cancelled check copies, bank statements, etc.) must be submitted with the application. If such a grant is approved, payment will not be made until this documentation is received by the Foundation.

The average grant made by the Foundation is $10,000. For requests for projects whose completion cost is in excess of US$50,000, applications cannot be accepted until at least 75% of the funds needed for the total project have been secured from other sources.

Because of the large number of requests received by the Foundation, it is recommended that an applicant submit applications to other organizations at the same time. It is important that all organizations, to which applications for the same project have been submitted, be advised when one of the other organizations makes a grant. Please list these requests when applying to the Loyola Foundation.

Please note that only one request in a diocesan area is accepted for consideration in any given year. In all cases, applications are held for a period of one year only from time of submission. Individual grant recipients will need to wait a minimum of three years before reapplying to the Loyola Foundation.

The Foundation does not accept requests for operating expenses, scholarships, tuitions, endowment funds, travel, and meeting costs. The Foundation does not make grants for continuing subsidies, emergency needs, minor seminaries or individuals. Correspondence and applications should be sent to:

The Loyola Foundation, Inc.
10335 Democracy Lane, Suite 202
Fairfax, VA 22030
Tel: (571) 435-9401
Fax: (571) 435-9402

THE LOYOLA FOUNDATION

est. 1957

APPLICATION FORM

REQUEST NUMBER: ______________________

A. NAME AND ADDRESS of tax exempt organization submitting application

____

____

____

on behalf of: ______________________

____

____

____

B. CONTACT PERSON AND TITLE

Name: ______________________

Email: ______________________

C. NAME AND ADDRESS of Ordinary of project's Diocese: (approval letter, with affixed seal, must be attached)

____

____

1. FINANCIAL REQUEST

Date: ______________________

Amount requested in U.S. funds: $ ______________________

and local currency: ______________________

Diocesan Bank account name and number: ______________________

SWIFT CODE: ______________________

____

2. REQUEST

____

____

____

____

3. INTRODUCTION

Give brief description of the organization seeking funds (attach additional material if necessary):

____

____

____

____

4. REGIONAL SUMMARY

Give brief outline of economic and geographic condition of area. Include a map of project's location.

____

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____

____

5. PROBLEMS & OBJECTIVES

Briefly (A) describe the basic problem or need and (B) identify what you want to accomplish.

6. PROJECT STATUS, COST AND FINANCING

Current status of project. How long to complete? Total cost and breakdown of costs. What funds already obtained? List sources and amounts. Include any other Foundations applied to.

7. VEHICLE APPLICATION

List the number of vehicles in use in the project. List the number of religious using these vehicles. List the type of vehicles, date of purchase and where funds secured for purchase. (Attach a pro forma statement from a local dealership quoting the cost of the vehicle desired):