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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. By law, the IRS cannot redact the information on the form.**

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

OMB No 1545-0052

2013

Open to Public Inspection

For calendar year 2013, or tax year beginning 12-01-2013 , and ending 11-30-2014

Name of foundation
YOUNG FAMILY FOUNDATION

A Employer identification number
04-3525914

Number and street (or P O box number if mail is not delivered to street address)
P O BOX 1267

Room/suite

B Telephone number (see instructions)
(918) 458-9271

City or town, state or province, country, and ZIP or foreign postal code
FORT GIBSON, OK 74434

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 ▶ ☐

E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐

H Check type of organization ☑ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year *(from Part II, col. (c), line 16)*▶$ 6,706,385

J Accounting method ☑ Cash ☐ Accrual
☐ Other (specify)
(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) (see instructions))*

	Line	Description	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc , received (attach schedule)				
	2	Check ▶ ☑ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments				
	4	Dividends and interest from securities	131,796	131,796	131,796	
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	289,540			
	b	Gross sales price for all assets on line 6a 2,159,259				
	7	Capital gain net income (from Part IV, line 2)		289,540		
	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	421,336	421,336	131,796	
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)	2,528	2,528	2,528	
	c	Other professional fees (attach schedule)	45,573	45,573	45,573	
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	10,856	2,236	2,236	70
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)				
	24	**Total operating and administrative expenses.** Add lines 13 through 23	58,957	50,337	50,337	70
	25	Contributions, gifts, grants paid	312,701			312,701
	26	**Total expenses and disbursements.** Add lines 24 and 25	371,658	50,337	50,337	312,771
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	49,678			
	b	**Net investment income** (if negative, enter -0-)		370,999		
	c	**Adjusted net income** (if negative, enter -0-)			81,459	

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 (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	916,160	253,660	253,660
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)	299,962	321,466	322,771
b	Investments—corporate stock (attach schedule)	2,456,363	2,767,367	3,957,144
c	Investments—corporate bonds (attach schedule)	1,774,398	2,154,068	2,172,810
11	Investments—land, buildings, and equipment basis ▶ Less accumulated depreciation (attach schedule) ▶			
12	Investments—mortgage loans			
13	Investments—other (attach schedule)			
14	Land, buildings, and equipment basis ▶ Less accumulated depreciation (attach schedule) ▶			
15	Other assets (describe ▶)			
16	**Total assets** (to be completed by all filers—see the instructions Also, see page 1, item I)	5,446,883	5,496,561	6,706,385
Liabilities				
17	Accounts payable and accrued expenses			
18	Grants payable			
19	Deferred revenue			
20	Loans from officers, directors, trustees, and other disqualified persons			
21	Mortgages and other notes payable (attach schedule)			
22	Other liabilities (describe ▶)			
23	**Total liabilities** (add lines 17 through 22)		0	
Net Assets or Fund Balances				
	Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.			
24	Unrestricted			
25	Temporarily restricted			
26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☑ and complete lines 27 through 31.			
27	Capital stock, trust principal, or current funds			
28	Paid-in or capital surplus, or land, bldg , and equipment fund			
29	Retained earnings, accumulated income, endowment, or other funds	5,446,883	5,496,561	
30	**Total net assets or fund balances** (see page 17 of the instructions)	5,446,883	5,496,561	
31	**Total liabilities and net assets/fund balances** (see page 17 of the instructions)	5,446,883	5,496,561	

Part III **Analysis of Changes in Net Assets or Fund Balances**

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	5,446,883
2	Enter amount from Part I, line 27a	2	49,678
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	5,496,561
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	5,496,561

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 Additional Data Table			
b				
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	See Additional Data Table			
b				
c				
d				
e				

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a	See Additional Data Table			
b				
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	289,540
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	-3,333

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 page 18 of 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	295,322	6,394,411	0 04618
2011	290,849	6,016,462	0 04834
2010	295,070	6,096,467	0 04840
2009	282,808	5,847,686	0 04836
2008	338,829	5,710,365	0 05934

2	**Total** of line 1, column (d)	2	0 25062
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 05013
4	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	6,685,655
5	Multiply line 4 by line 3	5	335,118
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	3,710
7	Add lines 5 and 6	7	338,828
8	Enter qualifying distributions from Part XII, line 4	8	312,771

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 page 18 of the instructions)**

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1 Date of ruling or determination letter ________ **(attach copy of letter if necessary–see instructions)**			
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☐ and enter 1% of Part I, line 27b		1	7,420
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	
3	Add lines 1 and 2		3	7,420
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	7,420
6	Credits/Payments			
a	2013 estimated tax payments and 2012 overpayment credited to 2013	6a 7,200		
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	7,200
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	220
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶		10	
11	Enter the amount of line 10 to be **Credited to 2014 estimated tax** ▶ **Refunded** ▶		11	

Part VII-A **Statements Regarding Activities**

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		No
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?	1b		No
	*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		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year **(1)** On the foundation ▶ $ ________ **(2)** On foundation managers ▶ $ ________			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ ________			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities.*	2		No
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		No
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		No
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		No
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	Yes	
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	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶MA			
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*	8b	Yes	
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		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses.*	10		No

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		No
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		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	

Website address ▶N/A

14 The books are in care of ▶TAMMY MURRAY Telephone no ▶(918) 458-9271

Located at ▶P O BOX 1267 FORT GIBSON OK ZIP+4 ▶74434

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

			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		No
	See 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 page 20 of the instructions)?	1b		No
	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		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? ☐ **Yes** ☑ **No**			
	If "Yes," list the years ▶ 20___, 20___, 20___, 20___			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement—see instructions)	2b		No
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ▶ 20___, 20___, 20___, 20___			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ **Yes** ☑ **No**			
b	If "Yes," did it have excess business holdings in 2013 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969, **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013.)*	3b		No
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
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		No

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required *(continued)*

5a	During the year did the foundation pay or incur any amount to			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☑ No			
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☑ No			
	(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☑ No			
	(4) Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions) ☐ Yes ☑ No			
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☑ No			
b	If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53 4945 or in a current notice regarding disaster assistance (see instructions)?	**5b**		**No**
	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? ☐ 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**
	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?	**7b**		**No**

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
E Ryker Young 24481 South Manard Road Fort Gibson, OK 74434	Trustee 0 00	0		
Tina B Young 24481 South Manard Road Fort Gibson, OK 74434	Trustee 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	
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 page 24 of the instructions **3**	
Total. Add lines 1 through 3 . . . . ▶	

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	6,096,760
b	Average of monthly cash balances	1b	690,707
c	Fair market value of all other assets (see instructions)	1c	0
d	**Total** (add lines 1a, b, and c)	1d	6,787,467
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	
3	Subtract line 2 from line 1d	3	6,787,467
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	101,812
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	6,685,655
6	**Minimum investment return.** Enter 5% of line 5	6	334,283

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	334,283
2a	Tax on investment income for 2013 from Part VI, line 5 — 2a: 7,420		
b	Income tax for 2013 (This does not include the tax from Part VI) — 2b:		
c	Add lines 2a and 2b	2c	7,420
3	Distributable amount before adjustments Subtract line 2c from line 1	3	326,863
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	326,863
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	326,863

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	312,771
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	312,771
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions)	5	
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	312,771

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				326,863
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only.			312,701	
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.				
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ $ 312,771				
a Applied to 2012, but not more than line 2a			312,701	
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2013 distributable amount.				70
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				
b Prior years' undistributed income Subtract line 4b from line 2b				
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				
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014				326,793
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 organization is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			(e) Total
	(a) 2013	(b) 2012	(c) 2011	(d) 2010	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
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 organization 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

Joseph P Rigali
62 Walnut Street
Wellesley, MA 024812109
(918) 458-9271

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

None specified

c Any submission deadlines

N/A

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

None

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 Additional Data Table				
Total . . . . ▶ **3a**				312,701
b *Approved for future payment*				
Total . . . . ▶ **3b**				

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) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments. . . .					
3 Interest on savings and temporary cash investments			14		
4 Dividends and interest from securities. . . .			14	131,796	
5 Net rental income or (loss) from real estate					
a Debt-financed property.					
b Not debt-financed property.					
6 Net rental income or (loss) from personal property					
7 Other investment income.					
8 Gain or (loss) from sales of assets other than inventory			18	289,540	
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). .				421,336	

13 **Total.** Add line 12, columns (b), (d), and (e). **13** 421,336

(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) (See instructions)

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

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

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 or fiduciary) is based on all information of which preparer has any knowledge

******	2015-01-26	******	May the IRS discuss this return with the preparer shown below (see instr)? ☑ Yes ☐ No
Signature of officer or trustee	Date	Title	

Paid Preparer Use Only

Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☐	PTIN
Molly R Reeves				P00102700
Firm's name ▶ Moffitt Parker and Co Inc			Firm's EIN ▶	
Firm's address ▶ 215 State St Ste 900 Muskogee, OK 74401			Phone no (918)683-2931	

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
60,000 Delmarva Pwr & Lt Bonds	P	2012-10-26	2013-12-01
3,735 Small Bus Adm GTD Ptnct Bonds	P	2012-12-10	2014-02-11
50,000 CSX Corp Bonds	P	2009-01-27	2014-02-15
100,000 Paccar Inc Bonds	P	2009-06-23	2014-02-15
25,000 Union Pac Corp Bonds	P	2013-05-31	2014-02-15
50,000 Union Pac Corp Bonds	P	2010-05-25	2014-02-15
60,000 GTE Corp Bonds	P	2013-03-19	2014-03-19
75,000 NStar Elec Co Bonds	P	2011-04-12	2014-04-15
200,000 Fed Farm Cr Bks Bonds	P	2009-07-07	2014-04-17
100,000 BB&T Corp Bonds	P	2009-06-18	2014-04-30
935 Small Bus Adm GTD Ptnct Bonds	P	2012-12-10	2014-05-12
75,000 Bellsouth Corp Bonds	P	2013-02-28	2014-07-15
50,000 Detroit Edison Co Bonds	P	2014-05-09	2014-07-23
2,476 Small Bus Adm GTD Ptnct Bonds	P	2012-12-10	2014-08-12
80,000 Pacificorp Bonds	P	2013-04-02	2014-08-15
100,000 Norfolk Southern Corp Bonds	P	2009-04-22	2014-09-17
25,000 Penn St Higher Ed Bonds	P	2007-09-13	2014-10-30
110,000 Fed Home Loan Banks Bonds	P	2014-05-23	2014-10-30
50,000 Penn St Higher Ed Bonds	P	2007-09-13	2014-11-06
371 Small Bus Adm GTD Ptnct Bonds	P	2012-12-10	2014-11-10
60 Bob Evans Farms Inc	P	2012-10-26	2013-12-04
170 Deluxe Corp Com	P	2010-03-12	2013-12-11
150 West Pharm Svsc Inc	P	2011-01-27	2013-12-11
110 Bob Evans Farms Inc	P	2012-10-26	2013-12-11
140 Bob Evans Farms Inc	P	2012-11-21	2013-12-11
100 Ameriprise Finl Inc	P	2009-05-08	2014-01-06
130 Tal Intl Group Inc	P	2012-12-14	2014-01-09
100 Tal Intl Group Inc	P	2011-06-21	2014-01-09
880 First Niagara Finl	P	2009-07-23	2014-01-09
480 First Niagara Finl	P	2009-05-27	2014-01-09

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
740 First Niagara Finl	P	2012-07-30	2014-01-09
170 Devon Energy Corp Com	P	2012-01-17	2014-01-28
160 Devon Energy Corp Com	P	2012-08-21	2014-01-28
450 Sonoco Prods Co	P	2009-05-08	2014-01-29
60 West Pharm Svsc Inc	P	2011-01-27	2014-02-04
170 Fidelity National Finl	P	2012-12-20	2014-02-05
250 Fidelity National Finl	P	2012-10-04	2014-02-05
60 West Pharm Svsc Inc	P	2011-01-27	2014-02-05
200 EOG Res Inc Com	P	2012-06-29	2014-04-28
79 West Pharm Svsc Inc	P	2011-01-27	2014-05-13
248 West Pharm Svsc Inc	P	2011-01-27	2014-05-14
133 West Pharm Svsc Inc	P	2011-01-27	2014-05-15
181 Smucker Co	P	2009-05-08	2014-06-17
320 Accenture PLC Ireland Cl A	P	2009-05-08	2014-06-18
109 Smucker Co	P	2009-05-08	2014-06-18
1 Fidelity National Finl	P	2012-10-04	2014-07-01
170 Cleco Corp New	P	2013-02-07	2014-07-02
223 Fidelity National Finl	P	2012-10-04	2014-07-10
63 Fidelity National Finl	P	2013-10-31	2014-07-10
180 Halliburton Co Com	P	2013-02-05	2014-07-10
340 Colgate Palmolive	P	2011-06-17	2014-08-18
110 Halliburton Co Com	P	2009-05-08	2014-09-03
110 Baxter Intl Inc	P	2014-03-31	2014-09-17
420 Baxter Intl Inc	P	2013-06-20	2014-09-17
50 Baxter Intl Inc	P	2014-01-30	2014-09-17
175 Tal Intl Group Inc	P	2011-06-21	2014-10-23
56 Tal Intl Group Inc	P	2011-06-20	2014-10-23
127 Tal Intl Group Inc	P	2011-06-20	2014-10-27
142 Tal Intl Group Inc	P	2011-06-17	2014-10-27
181 Douglas Dynamics Inc	P	2011-05-23	2014-10-30

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
69 Douglas Dynamics Inc	P	2011-05-23	2014-11-03
120 Douglas Dynamics Inc	P	2011-05-20	2014-11-03
116 Douglas Dynamics Inc	P	2011-05-20	2014-11-14
80 Tiffany & Co New Com	P	2012-10-11	2014-11-17
10 Tiffany & Co New Com	P	2012-07-19	2014-11-17
64 Douglas Dynamics Inc	P	2011-05-20	2014-11-17
30 Douglas Dynamics Inc	P	2011-05-19	2014-11-17
70 Microsoft Corp Com	P	2011-05-10	2014-11-21
90 Microsoft Corp Com	P	2011-03-17	2014-11-21
120 Bob Evans Farms Inc	P	2012-06-05	2013-12-04
190 Protective Life Corp	P	2011-09-30	2013-12-04
10 Prosperity Bancshares Inc	P	2011-12-14	2013-12-05
150 Prosperity Bancshares Inc	P	2009-05-08	2013-12-05
160 Prosperity Bancshares Inc	P	2009-05-08	2013-12-11
200 Firstmerit Corp	P	2011-05-12	2013-12-16
160 Firstmerit Corp	P	2011-03-09	2013-12-16
161 Chemtura Corp	P	2012-11-16	2013-12-16
219 Chemtura Corp	P	2012-11-16	2013-12-17
70 Teledyne Tech Inc	P	2011-06-15	2013-12-17
680 Chemtura Corp	P	2012-11-16	2013-12-18
11 Teledyne Tech Inc	P	2011-06-15	2013-12-20
189 Teledyne Tech Inc	P	2011-06-14	2013-12-20
110 Tal Intl Group Inc	P	2012-12-17	2014-01-09
52 Bancorpsouth Inc	P	2013-05-06	2014-01-15
138 Bancorpsouth Inc	P	2013-05-06	2014-01-16
120 Bob Evans Farms Inc	P	2012-06-05	2014-01-22
90 Bob Evans Farms Inc	P	2012-06-05	2014-01-23
50 FEI Co	P	2009-05-08	2014-01-28
41 Fair Isaac Corp	P	2012-10-26	2014-02-04
86 West Pharm Svsc Inc	P	2012-04-30	2014-02-04

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
20 West Pharm Svsc Inc	P	2012-04-30	2014-02-05
64 West Pharm Svsc Inc	P	2012-05-01	2014-02-05
89 Fair Isaac Corp	P	2012-10-26	2014-02-06
109 Glatfelter Com	P	2012-08-20	2014-02-13
151 Glatfelter Com	P	2012-08-20	2014-02-14
20 Glatfelter Com	P	2011-03-03	2014-02-14
60 Bob Evans Farms Inc	P	2012-06-05	2014-02-18
50 Bob Evans Farms Inc	P	2012-07-17	2014-02-18
26 Bob Evans Farms Inc	P	2012-10-25	2014-02-18
114 Bob Evans Farms Inc	P	2012-10-26	2014-02-18
69 Enernoc Inc	P	2013-10-18	2014-02-24
181 Enernoc Inc	P	2013-10-18	2014-02-25
20 Enernoc Inc	P	2013-09-24	2014-02-25
220 Firstmerit Corp	P	2011-03-09	2014-03-03
400 Firstmerit Corp	P	2012-10-11	2014-03-03
70 West Pharm Svsc Inc	P	2012-05-01	2014-03-04
150 Enernoc Inc	P	2013-09-24	2014-03-04
320 Fair Isaac Corp	P	2012-10-26	2014-03-04
20 Fair Isaac Corp	P	2012-11-21	2014-03-04
20 Tal Intl Group Inc	P	2012-12-17	2014-03-07
15 Tal Intl Group Inc	P	2012-06-28	2014-03-07
57 Tal Intl Group Inc	P	2011-06-20	2014-03-07
90 U S Ecology Inc	P	2011-01-14	2014-03-10
48 U S Ecology Inc	P	2009-05-08	2014-03-10
90 West Pharm Svsc Inc	P	2012-05-01	2014-03-10
62 U S Ecology Inc	P	2009-05-08	2014-03-11
80 Lancaster Colony Corp	P	2011-01-27	2014-03-11
92 Tal Intl Group Inc	P	2011-06-20	2014-03-11
116 Tal Intl Group Inc	P	2011-06-17	2014-03-11
100 Tal Intl Group Inc	P	2011-08-26	2014-03-11

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
108 Altra Hldgs Inc	P	2012-05-16	2014-03-13
102 Altra Hldgs Inc	P	2012-05-17	2014-03-13
50 Core Mark Hldg	P	2010-05-24	2014-03-21
220 Core Mark Hldg	P	2009-05-08	2014-03-21
150 Pacwest Bancorp	P	2013-04-02	2014-04-07
10 Pacwest Bancorp	P	2013-01-09	2014-04-07
30 FEI Co	P	2009-05-08	2014-04-07
170 Drew Inds Inc	P	2011-05-02	2014-04-17
96 Portland Gen Elec	P	2010-12-28	2014-04-17
124 Portland Gen Elec	P	2010-12-28	2014-04-21
190 Bonanza Creek Energy	P	2013-04-17	2014-04-21
10 Rosetta Resources Inc	P	2010-03-12	2014-04-21
90 Rosetta Resources Inc	P	2010-03-26	2014-04-21
80 Rosetta Resources Inc	P	2010-01-21	2014-04-21
180 Drew Inds Inc	P	2011-05-02	2014-05-05
380 Reachlocal Inc	P	2013-05-08	2014-05-07
17 West Pharm Svsc Inc	P	2012-05-01	2014-05-13
80 Lithia Mtrs Inc	P	2012-10-09	2014-05-13
13 West Pharm Svsc Inc	P	2012-05-01	2014-05-14
40 West Pharm Svsc Inc	P	2010-11-04	2014-05-14
30 West Pharm Svsc Inc	P	2010-11-04	2014-05-15
210 Reachlocal Inc	P	2013-07-29	2014-05-15
434 Reachlocal Inc	P	2013-04-11	2014-05-15
446 Reachlocal Inc	P	2013-05-08	2014-05-15
60 Reachlocal Inc	P	2013-04-12	2014-05-15
320 Stepan Co	P	2013-12-03	2014-05-22
130 Stepan Co	P	2013-11-20	2014-05-22
350 Enernoc Inc	P	2013-09-24	2014-06-03
39 Lithia Mtrs Inc	P	2012-10-09	2014-06-25
31 Lithia Mtrs Inc	P	2012-10-11	2014-06-25

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
50 Mid-Amer Apt Cmntys	P	2012-03-09	2014-07-18
40 Lithia Mtrs Inc	P	2012-10-11	2014-07-18
170 Bancorpsouth Inc	P	2013-05-06	2014-07-22
66 Bancorpsouth Inc	P	2013-02-27	2014-07-22
36 Bancorpsouth Inc	P	2013-02-27	2014-07-23
158 Bancorpsouth Inc	P	2013-02-26	2014-07-23
40 Mid-Amer Apt Cmntys	P	2012-03-09	2014-08-12
10 Mid-Amer Apt Cmntys	P	2010-10-27	2014-08-12
13 Lithia Mtrs Inc	P	2012-10-11	2014-08-18
19 Lithia Mtrs Inc	P	2012-10-10	2014-08-18
28 Lithia Mtrs Inc	P	2012-10-10	2014-08-19
70 Steris Corp	P	2013-02-06	2014-08-27
90 Portland Gen Elec	P	2010-03-12	2014-08-27
40 Mid-Amer Apt Cmntys	P	2010-10-27	2014-08-27
70 West Pharm Svsc Inc	P	2010-11-04	2014-08-28
47 West Pharm Svsc Inc	P	2009-05-08	2014-08-28
313 West Pharm Svsc Inc	P	2009-05-08	2014-09-02
42 Pacwest Bancorp	P	2013-06-10	2014-09-05
48 Pacwest Bancorp	P	2013-06-11	2014-09-05
39 Enernoc Inc	P	2013-09-24	2014-09-05
111 Enernoc Inc	P	2013-09-24	2014-09-08
385 Enernoc Inc	P	2013-09-23	2014-09-24
86 Enernoc Inc	P	2013-09-24	2014-09-24
389 Enernoc Inc	P	2013-10-04	2014-09-24
100 Stifel Finl Corp	P	2013-05-21	2014-09-25
110 Fuller Co	P	2014-02-18	2014-09-25
20 Fuller Co	P	2014-03-31	2014-09-25
70 Rosetta Resources Inc	P	2013-07-23	2014-09-25
50 Rosetta Resources Inc	P	2010-01-21	2014-09-25
80 Portland Gen Elec	P	2010-03-12	2014-10-17

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
50 Steris Corp	P	2013-02-06	2014-10-17
10 Steris Corp	P	2013-02-07	2014-10-17
10 Applied Indl Tech	P	2012-08-13	2014-10-17
34 Applied Indl Tech	P	2011-01-20	2014-10-17
26 Applied Indl Tech	P	2011-01-20	2014-10-20
88 U S Ecology Inc	P	2014-09-08	2014-10-20
32 U S Ecology Inc	P	2009-05-08	2014-10-20
40 Standex Intl Corp	P	2014-04-30	2014-10-20
30 Fuller Co	P	2014-03-31	2014-10-22
80 Fuller Co	P	2014-05-08	2014-10-22
44 Fuller Co	P	2014-08-26	2014-10-22
50 Rosetta Resources Inc	P	2010-01-21	2014-10-22
190 Rosetta Resources Inc	P	2010-05-19	2014-10-22
47 Rosetta Resources Inc	P	2010-08-12	2014-10-22
126 Beacon Roofing Supply	P	2012-09-28	2014-10-22
173 Rosetta Resources Inc	P	2010-08-12	2014-10-23
48 Beacon Roofing Supply	P	2012-09-28	2014-10-23
240 Beacon Roofing Supply	P	2012-10-01	2014-10-23
236 Beacon Roofing Supply	P	2012-09-26	2014-10-23
16 Fuller Co	P	2014-08-26	2014-10-28
20 Fuller Co	P	2012-11-20	2014-10-28
350 Fuller Co	P	2012-02-17	2014-10-28
80 United Stationers Inc	P	2013-07-23	2014-11-10
90 United Stationers Inc	P	2013-04-18	2014-11-10
60 ICU Med Inc	P	2013-10-22	2014-11-19
30 ICU Med Inc	P	2011-04-15	2014-11-19
40 Steris Corp	P	2013-02-07	2014-11-19
20 Steris Corp	P	2013-02-07	2014-11-20
20 Steris Corp	P	2012-12-26	2014-11-20

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
60,000		60,000	
3,735		3,963	-228
50,000		50,000	
100,000		100,000	
25,000		25,000	
50,000		50,000	
71,811		71,254	557
75,000		75,000	
200,000		200,000	
100,000		100,000	
935		993	-58
82,659		82,659	
51,285		51,285	
2,476		2,628	-152
80,000		80,000	
100,000		100,000	
25,000		25,002	-2
110,000		110,000	
50,000		50,005	-5
371		394	-23
3,115		2,274	841
8,386		3,243	5,143
7,131		3,075	4,056
5,561		4,169	1,392
7,077		4,995	2,082
11,321		2,759	8,562
6,114		4,394	1,720
4,703		3,221	1,482
8,959		10,497	-1,538
4,887		5,655	-768

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
7,534		5,687	1,847
10,064		10,837	-773
9,472		9,626	-154
18,537		11,573	6,964
2,754		1,230	1,524
5,213		4,069	1,144
7,667		5,559	2,108
2,728		1,230	1,498
9,715		4,484	5,231
3,394		1,620	1,774
10,400		5,084	5,316
5,523		2,727	2,796
19,192		7,384	11,808
26,404		9,486	16,918
11,556		4,446	7,110
11		7	4
9,905		7,309	2,596
3,476		2,521	955
988		915	73
12,471		7,395	5,076
21,972		14,924	7,048
7,419		2,551	4,868
7,994		8,113	-119
30,523		28,678	1,845
3,634		3,480	154
7,080		5,259	1,821
2,266		1,617	649
5,064		3,668	1,396
5,662		4,039	1,623
3,716		2,754	962

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
1,443		1,050	393
2,509		1,825	684
2,662		1,765	897
8,116		5,047	3,069
1,015		572	443
1,460		974	486
684		456	228
3,340		1,808	1,532
4,294		2,254	2,040
6,241		4,802	1,439
9,109		3,018	6,091
625		382	243
9,371		4,479	4,892
9,861		4,778	5,083
4,371		3,446	925
3,497		2,750	747
4,294		3,059	1,235
5,816		4,160	1,656
6,242		3,296	2,946
18,029		12,918	5,111
998		518	480
17,154		8,821	8,333
5,168		3,766	1,402
1,262		846	416
3,327		2,245	1,082
5,711		4,802	909
4,206		3,601	605
4,549		1,006	3,543
2,142		1,875	267
3,952		1,941	2,011

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
910		451	459
2,913		1,444	1,469
4,572		4,070	502
3,175		1,821	1,354
4,364		2,523	1,841
578		252	326
2,992		2,401	591
2,493		1,997	496
1,296		992	304
5,684		4,327	1,357
1,519		1,113	406
3,916		2,919	997
433		301	132
4,510		3,781	729
8,200		5,924	2,276
3,225		1,580	1,645
3,214		2,256	958
17,323		14,634	2,689
1,083		862	221
887		670	217
665		470	195
2,528		1,729	799
3,436		1,634	1,802
1,832		860	972
4,156		2,031	2,125
2,363		1,111	1,252
7,554		4,619	2,935
3,911		2,791	1,120
4,931		3,468	1,463
4,251		2,682	1,569

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
3,775		1,860	1,915
3,566		1,729	1,837
3,634		1,367	2,267
15,991		4,672	11,319
6,854		4,323	2,531
457		268	189
2,895		603	2,292
8,797		3,883	4,914
3,089		2,129	960
4,003		2,750	1,253
9,178		6,311	2,867
485		253	232
4,362		2,084	2,278
3,878		1,755	2,123
9,057		4,112	4,945
2,782		5,952	-3,170
723		384	339
5,953		2,902	3,051
543		293	250
1,672		783	889
1,238		587	651
1,408		2,784	-1,376
2,910		6,841	-3,931
2,990		6,986	-3,996
402		912	-510
16,593		20,037	-3,444
6,741		7,806	-1,065
6,116		5,265	851
3,514		1,415	2,099
2,793		1,113	1,680

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
3,686		3,220	466
3,642		1,436	2,206
3,656		2,765	891
1,419		996	423
759		543	216
3,333		2,337	996
2,811		2,576	235
703		610	93
1,165		467	698
1,703		680	1,023
2,493		1,003	1,490
3,910		2,782	1,128
3,049		1,735	1,314
2,863		2,438	425
3,037		1,370	1,667
2,039		785	1,254
13,645		5,229	8,416
1,779		1,209	570
2,033		1,366	667
752		587	165
2,158		1,670	488
6,966		5,717	1,249
1,556		1,294	262
7,039		5,834	1,205
4,766		3,589	1,177
4,160		5,367	-1,207
756		969	-213
3,067		3,320	-253
2,191		1,097	1,094
2,680		1,543	1,137

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
2,716		1,987	729
543		396	147
445		408	37
1,514		1,155	359
1,143		883	260
3,872		3,888	-16
1,408		574	834
2,985		2,323	662
1,230		1,454	-224
3,281		3,840	-559
1,804		2,062	-258
1,848		1,097	751
7,022		4,070	2,952
1,737		962	775
3,306		3,620	-314
6,476		3,543	2,933
1,275		1,379	-104
6,376		6,850	-474
6,270		6,586	-316
660		750	-90
825		637	188
14,429		10,813	3,616
3,401		3,259	142
3,826		3,328	498
4,991		4,046	945
2,496		1,335	1,161
2,475		1,584	891
1,234		792	442
1,234		695	539

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			**(l)** Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	**(j)** Adjusted basis as of 12/31/69	**(k)** Excess of col (i) over col (j), if any	
			-228
			557
			-58
			-152
			-2
			-5
			-23
			841
			5,143
			4,056
			1,392
			2,082
			8,562
			1,720
			1,482
			-1,538
			-768

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			**(l)** Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	**(j)** Adjusted basis as of 12/31/69	**(k)** Excess of col (i) over col (j), if any	
			1,847
			-773
			-154
			6,964
			1,524
			1,144
			2,108
			1,498
			5,231
			1,774
			5,316
			2,796
			11,808
			16,918
			7,110
			4
			2,596
			955
			73
			5,076
			7,048
			4,868
			-119
			1,845
			154
			1,821
			649
			1,396
			1,623
			962

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			393
			684
			897
			3,069
			443
			486
			228
			1,532
			2,040
			1,439
			6,091
			243
			4,892
			5,083
			925
			747
			1,235
			1,656
			2,946
			5,111
			480
			8,333
			1,402
			416
			1,082
			909
			605
			3,543
			267
			2,011

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			**(l)** Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	**(j)** Adjusted basis as of 12/31/69	**(k)** Excess of col (i) over col (j), if any	
			459
			1,469
			502
			1,354
			1,841
			326
			591
			496
			304
			1,357
			406
			997
			132
			729
			2,276
			1,645
			958
			2,689
			221
			217
			195
			799
			1,802
			972
			2,125
			1,252
			2,935
			1,120
			1,463
			1,569

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	**(j)** Adjusted basis as of 12/31/69	**(k)** Excess of col (i) over col (j), if any	
			1,915
			1,837
			2,267
			11,319
			2,531
			189
			2,292
			4,914
			960
			1,253
			2,867
			232
			2,278
			2,123
			4,945
			-3,170
			339
			3,051
			250
			889
			651
			-1,376
			-3,931
			-3,996
			-510
			-3,444
			-1,065
			851
			2,099
			1,680

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			466
			2,206
			891
			423
			216
			996
			235
			93
			698
			1,023
			1,490
			1,128
			1,314
			425
			1,667
			1,254
			8,416
			570
			667
			165
			488
			1,249
			262
			1,205
			1,177
			-1,207
			-213
			-253
			1,094
			1,137

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			**(l)** Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	**(j)** Adjusted basis as of 12/31/69	**(k)** Excess of col (i) over col (j), if any	
			729
			147
			37
			359
			260
			-16
			834
			662
			-224
			-559
			-258
			751
			2,952
			775
			-314
			2,933
			-104
			-474
			-316
			-90
			188
			3,616
			142
			498
			945
			1,161
			891
			442
			539

Form 990PF Part XV Line 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*				
Northeastern State University Found 812 N Cedar Ave Tahlequah, OK 74464	N/A	501(c)(3)	Program Support	62,500
NSU Campus Christian Fellowship P O Box 886 Tahlequah, OK 74465	N/A	501(c)(3)	Program Support	80,000
First Baptist Church of Hulbert 126 East Fifth Street Hulbert, OK 74441	None	Church	Program Support	50,000
Student Mobilization P O Box 567 Conway, AR 72033	None	501(c)(3)	Program Support	12,000
Fort Gibson Education Foundation 500 Ross Avenue Fort Gibson, OK 74434	None	501(c)(3)	Program Support	28,601
Prosper United Methodist Church 205 S Church Street Prosper, TX 75078	None	Church	Program Support	20,000
Cookson Hills Christian School Inc 60416 Highway 10 Kansas, OK 74347	None	501(c)(3)	Program Support	50,000
Tahlequah Hospital Foundation P O Box 1008 Tahlequah, OK 74465	None	501(c)(3)	Program Support	9,600
Total . . . . ▶ **3a**				312,701

TY 2013 Accounting Fees Schedule

Name: YOUNG FAMILY FOUNDATION

EIN: 04-3525914

Software ID: 13000170

Software Version: 2013v4.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Tax Preparation	2,528	2,528	2,528	0

TY 2013 Investments Corporate Bonds Schedule

Name: YOUNG FAMILY FOUNDATION

EIN: 04-3525914

Software ID: 13000170

Software Version: 2013v4.0

Name of Bond	End of Year Book Value	End of Year Fair Market Value
Fixed Income Portfolio-Corp	2,154,068	2,172,810

TY 2013 Investments Corporate Stock Schedule

Name: YOUNG FAMILY FOUNDATION
EIN: 04-3525914
Software ID: 13000170
Software Version: 2013v4.0

Name of Stock	End of Year Book Value	End of Year Fair Market Value
Equity Income Portfolio	1,364,487	2,035,074
Small Cap Portfolio	1,402,880	1,922,070

TY 2013 Investments Government Obligations Schedule

Name:	YOUNG FAMILY FOUNDATION
EIN:	04-3525914
Software ID:	13000170
Software Version:	2013v4.0
US Government Securities - End of Year Book Value:	321,466
US Government Securities - End of Year Fair Market Value:	322,771
State & Local Government Securities - End of Year Book Value:	
State & Local Government Securities - End of Year Fair Market Value:	

TY 2013 Other Professional Fees Schedule

Name: YOUNG FAMILY FOUNDATION
EIN: 04-3525914
Software ID: 13000170
Software Version: 2013v4.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Investment Mgmt Fees	45,573	45,573	45,573	0

TY 2013 Taxes Schedule

Name: YOUNG FAMILY FOUNDATION

EIN: 04-3525914

Software ID: 13000170

Software Version: 2013v4.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Federal Excise Tax	8,550			
Foreign Tax W/H on Dividends	2,236	2,236	2,236	
State Registration Fee	70			70