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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**

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▶ Information about Form 990-PF and its separate instructions is at [www.irs.gov/form990pf](http://www.irs.gov/form990pf).

OMB No 1545-0052

**2013**

For calendar year 2013, or tax year beginning Dec 1, 2013, and ending Nov 30, 2014

|                                                                                                                                                                                                                                                         |                                                                                                                             |                                                                                                                                                                                                     |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name of foundation<br><b>THE BAMFORD FOUNDATION</b>                                                                                                                                                                                                     |                                                                                                                             | <b>A</b> Employer identification number<br>91-1504193                                                                                                                                               |
| Number and street (or P.O. box number if mail is not delivered to street address)<br>PO BOX 2274                                                                                                                                                        |                                                                                                                             | <b>B</b> Telephone number (see the instructions)<br>(253) 383-8584                                                                                                                                  |
| City or town, state or province, country, and ZIP or foreign postal code<br>TACOMA WA 98401                                                                                                                                                             |                                                                                                                             | <b>C</b> If exemption application is pending, check here. <input type="checkbox"/>                                                                                                                  |
| <b>G</b> Check all that apply                                                                                                                                                                                                                           | <input type="checkbox"/> Initial return<br><input type="checkbox"/> Final return<br><input type="checkbox"/> Address change | <input type="checkbox"/> Initial Return of a former public charity<br><input type="checkbox"/> Amended return<br><input type="checkbox"/> Name change                                               |
| <b>H</b> Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation<br><input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation |                                                                                                                             | <b>D</b> 1 Foreign organizations, check here. . . . . <input type="checkbox"/><br>2 Foreign organizations meeting the 85% test, check here and attach computation. . . . . <input type="checkbox"/> |
| <b>I</b> Fair market value of all assets at end of year (from Part II, column (c), line 16)<br>\$ 7,566,406.                                                                                                                                            |                                                                                                                             | <b>E</b> If private foundation status was terminated under section 507(b)(1)(A), check here. . . . . <input type="checkbox"/>                                                                       |
| <b>J</b> Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual<br><input type="checkbox"/> Other (specify) _____<br>(Part I, column (d) must be on cash basis)                                                    |                                                                                                                             | <b>F</b> If the foundation is in a 60-month termination under section 507(b)(1)(B), check here. . . . . <input type="checkbox"/>                                                                    |

| <b>Part I Analysis of Revenue and Expenses</b> (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions)) |                                                                                          | (a) Revenue and expenses per books | (b) Net investment income | (c) Adjusted net income | (d) Disbursements for charitable purposes (cash basis only) |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------|------------------------------------|---------------------------|-------------------------|-------------------------------------------------------------|
| <b>REVENUE</b>                                                                                                                                                            | 1 Contributions, gifts, grants, etc., received (att sch) . . . . .                       | 1,660,000.                         |                           |                         |                                                             |
|                                                                                                                                                                           | 2 Ck <input checked="" type="checkbox"/> If the foundn is not req to att Sch B           |                                    |                           |                         |                                                             |
|                                                                                                                                                                           | 3 Interest on savings and temporary cash investments . . . . .                           |                                    |                           |                         |                                                             |
|                                                                                                                                                                           | 4 Dividends and interest from securities . . . . .                                       | 193,113.                           | 193,113.                  |                         |                                                             |
|                                                                                                                                                                           | 5a Gross rents . . . . .                                                                 |                                    |                           |                         |                                                             |
|                                                                                                                                                                           | b Net rental income or (loss) . . . . .                                                  |                                    |                           |                         |                                                             |
|                                                                                                                                                                           | 6a Net gain/(loss) from sale of assets not on line 10                                    | 95,369.                            |                           |                         |                                                             |
|                                                                                                                                                                           | b Gross sales price for all assets on line 6a . . . . .                                  | 1,294,422.                         |                           |                         |                                                             |
|                                                                                                                                                                           | 7 Capital gain net income (from Part IV, line 2) . . . . .                               |                                    | 95,369.                   |                         |                                                             |
|                                                                                                                                                                           | 8 Net short-term capital gain . . . . .                                                  |                                    |                           | 24,453.                 |                                                             |
|                                                                                                                                                                           | 9 Income modifications . . . . .                                                         |                                    |                           |                         |                                                             |
| 10a Gross sales less returns and allowances . . . . .                                                                                                                     |                                                                                          |                                    |                           |                         |                                                             |
| b Less Cost of goods sold . . . . .                                                                                                                                       |                                                                                          |                                    |                           |                         |                                                             |
| c Gross profit/(loss) (att sch) . . . . .                                                                                                                                 |                                                                                          |                                    |                           |                         |                                                             |
| 11 Other income (attach schedule) . . . . .                                                                                                                               |                                                                                          |                                    |                           |                         |                                                             |
| 12 <b>Total.</b> Add lines 1 through 11. . . . .                                                                                                                          | 1,948,482.                                                                               | 288,482.                           | 24,453.                   |                         |                                                             |
| <b>ADMINISTRATIVE AND EXPENSES</b>                                                                                                                                        | 13 Compensation of officers, directors, trustees, etc . . . . .                          | 31,775.                            | 4,766.                    |                         | 27,009.                                                     |
|                                                                                                                                                                           | 14 Other employee salaries and wages . . . . .                                           |                                    |                           |                         |                                                             |
|                                                                                                                                                                           | 15 Pension plans, employee benefits . . . . .                                            |                                    |                           |                         |                                                             |
|                                                                                                                                                                           | 16a Legal fees (attach schedule) . . . . .                                               |                                    |                           |                         |                                                             |
|                                                                                                                                                                           | b Accounting fees (attach sch) L-16b Stmt.                                               | 7,708.                             | 1,927.                    |                         | 5,781.                                                      |
|                                                                                                                                                                           | c Other prof fees (attach sch) L-16c Stmt.                                               | 8,225.                             | 8,225.                    |                         |                                                             |
|                                                                                                                                                                           | 17 Interest . . . . .                                                                    |                                    |                           |                         |                                                             |
|                                                                                                                                                                           | 18 Taxes (attach schedule)(see instrs) See Line 18 Stmt                                  | 4,484.                             | 2,291.                    |                         | 2,193.                                                      |
|                                                                                                                                                                           | 19 Depreciation (attach sch) and depletion . . . . .                                     |                                    |                           |                         |                                                             |
|                                                                                                                                                                           | 20 Occupancy . . . . .                                                                   |                                    |                           |                         |                                                             |
|                                                                                                                                                                           | 21 Travel, conferences, and meetings . . . . .                                           |                                    |                           |                         |                                                             |
|                                                                                                                                                                           | 22 Printing and publications . . . . .                                                   |                                    |                           |                         |                                                             |
|                                                                                                                                                                           | 23 Other expenses (attach schedule)<br>PHONE, WEBSITE                                    | 2,868.                             |                           |                         | 2,868.                                                      |
|                                                                                                                                                                           | 24 <b>Total operating and administrative expenses.</b> Add lines 13 through 23 . . . . . | 55,060.                            | 17,209.                   |                         | 37,851.                                                     |
|                                                                                                                                                                           | 25 Contributions, gifts, grants paid . . . . .                                           | 647,141.                           |                           |                         | 647,141.                                                    |
| 26 <b>Total expenses and disbursements.</b> Add lines 24 and 25 . . . . .                                                                                                 | 702,201.                                                                                 | 17,209.                            |                           | 684,992.                |                                                             |
| 27 Subtract line 26 from line 12:                                                                                                                                         |                                                                                          |                                    |                           |                         |                                                             |
| a <b>Excess of revenue over expenses and disbursements</b> . . . . .                                                                                                      | 1,246,281.                                                                               |                                    |                           |                         |                                                             |
| b <b>Net investment income</b> (if negative, enter -0-) . . . . .                                                                                                         |                                                                                          | 271,273.                           |                           |                         |                                                             |
| c <b>Adjusted net income</b> (if negative, enter -0-) . . . . .                                                                                                           |                                                                                          |                                    | 24,453.                   |                         |                                                             |

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| Part II Balance Sheets |             | Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions.)               |                                                              |                | Beginning of year     | End of year |  |
|------------------------|-------------|-----------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------|----------------|-----------------------|-------------|--|
|                        |             |                                                                                                                                   | (a) Book Value                                               | (b) Book Value | (c) Fair Market Value |             |  |
| ASSETS                 | 1           | Cash — non-interest-bearing . . . . .                                                                                             | 70,177.                                                      | 176,312.       | 176,312.              |             |  |
|                        | 2           | Savings and temporary cash investments . . . . .                                                                                  |                                                              |                |                       |             |  |
|                        | 3           | Accounts receivable . . . . .                                                                                                     |                                                              |                |                       |             |  |
|                        |             | Less allowance for doubtful accounts . . . . .                                                                                    |                                                              |                |                       |             |  |
|                        | 4           | Pledges receivable . . . . .                                                                                                      |                                                              |                |                       |             |  |
|                        |             | Less allowance for doubtful accounts . . . . .                                                                                    |                                                              |                |                       |             |  |
|                        | 5           | Grants receivable . . . . .                                                                                                       |                                                              |                |                       |             |  |
|                        | 6           | Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . . |                                                              |                |                       |             |  |
|                        | 7           | Other notes and loans receivable (attach sch) . . . . .                                                                           |                                                              |                |                       |             |  |
|                        |             | Less allowance for doubtful accounts . . . . .                                                                                    |                                                              |                |                       |             |  |
|                        | 8           | Inventories for sale or use . . . . .                                                                                             |                                                              |                |                       |             |  |
|                        | 9           | Prepaid expenses and deferred charges . . . . .                                                                                   |                                                              |                |                       |             |  |
|                        | 10a         | Investments — U S. and state government obligations (attach schedule) . . . . .                                                   |                                                              |                |                       |             |  |
|                        | b           | Investments — corporate stock (attach schedule) . . . . .                                                                         |                                                              |                |                       |             |  |
|                        | c           | Investments — corporate bonds (attach schedule) . . . . .                                                                         |                                                              |                |                       |             |  |
|                        | LIABILITIES | 11                                                                                                                                | Investments — land, buildings, and equipment basis . . . . . |                |                       |             |  |
|                        |             | Less accumulated depreciation (attach schedule) . . . . .                                                                         |                                                              |                |                       |             |  |
| 12                     |             | Investments — mortgage loans . . . . .                                                                                            |                                                              |                |                       |             |  |
| 13                     |             | Investments — other (attach schedule) . . . . .                                                                                   | 4,697,442.                                                   | 5,837,588.     | 7,390,094.            |             |  |
| 14                     |             | Land, buildings, and equipment basis . . . . .                                                                                    |                                                              |                |                       |             |  |
|                        |             | Less accumulated depreciation (attach schedule) . . . . .                                                                         |                                                              |                |                       |             |  |
| 15                     |             | Other assets (describe . . . . .)                                                                                                 |                                                              |                |                       |             |  |
| 16                     |             | <b>Total assets</b> (to be completed by all filers — see the instructions. Also, see page 1, item I.) . . . . .                   | 4,767,619.                                                   | 6,013,900.     | 7,566,406.            |             |  |
| 17                     |             | Accounts payable and accrued expenses . . . . .                                                                                   |                                                              |                |                       |             |  |
| 18                     |             | Grants payable . . . . .                                                                                                          |                                                              |                |                       |             |  |
| FUNDS                  | 19          | Deferred revenue . . . . .                                                                                                        |                                                              |                |                       |             |  |
|                        | 20          | Loans from officers, directors, trustees, & other disqualified persons . . . . .                                                  |                                                              |                |                       |             |  |
|                        | 21          | Mortgages and other notes payable (attach schedule) . . . . .                                                                     |                                                              |                |                       |             |  |
|                        | 22          | Other liabilities (describe . . . . .)                                                                                            |                                                              |                |                       |             |  |
|                        | 23          | <b>Total liabilities</b> (add lines 17 through 22) . . . . .                                                                      |                                                              |                |                       |             |  |
|                        |             | <b>Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.</b> . . . . .               |                                                              |                |                       |             |  |
|                        | 24          | Unrestricted . . . . .                                                                                                            |                                                              |                |                       |             |  |
|                        | 25          | Temporarily restricted . . . . .                                                                                                  |                                                              |                |                       |             |  |
|                        | 26          | Permanently restricted . . . . .                                                                                                  |                                                              |                |                       |             |  |
|                        |             | <b>Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.</b> . . . . .                            | X                                                            |                |                       |             |  |
| ASSETS                 | 27          | Capital stock, trust principal, or current funds . . . . .                                                                        |                                                              |                |                       |             |  |
|                        | 28          | Paid-in or capital surplus, or land, building, and equipment fund . . . . .                                                       |                                                              |                |                       |             |  |
|                        | 29          | Retained earnings, accumulated income, endowment, or other funds . . . . .                                                        | 4,767,619.                                                   | 6,013,900.     |                       |             |  |
|                        | 30          | <b>Total net assets or fund balances</b> (see instructions) . . . . .                                                             | 4,767,619.                                                   | 6,013,900.     |                       |             |  |
|                        | 31          | <b>Total liabilities and net assets/fund balances</b> (see instructions) . . . . .                                                | 4,767,619.                                                   | 6,013,900.     |                       |             |  |

## 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 | 4,767,619. |
| 2 | Enter amount from Part I, line 27a . . . . .                                                                                                                         | 2 | 1,246,281. |
| 3 | Other increases not included in line 2 (itemize) . . . . .                                                                                                           | 3 |            |
| 4 | Add lines 1, 2, and 3 . . . . .                                                                                                                                      | 4 | 6,013,900. |
| 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 | 6,013,900. |

**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,<br>2-story brick warehouse, or common stock, 200 shares MLC Company) |  | (b) How acquired<br>P — Purchase<br>D — Donation | (c) Date acquired<br>(month, day, year) | (d) Date sold<br>(month, day, year) |
|---------------------------------------------------------------------------------------------------------------------------------------------|--|--------------------------------------------------|-----------------------------------------|-------------------------------------|
| 1 a 7933.386 SHARES PIMCO TOTAL RETURN                                                                                                      |  | P                                                | 02/13/09                                | 10/14/14                            |
| b 45.076 SHARES E.I.I. GLOBAL PROPERTY                                                                                                      |  | P                                                | 09/16/09                                | 08/25/14                            |
| c 856.437 SHARES E.I.I. GLOBAL PROPERTY                                                                                                     |  | P                                                | 09/16/09                                | 08/07/14                            |
| d 656.599 SHARES VANGUARD LARGE CAP INDEX                                                                                                   |  | P                                                | 01/21/11                                | 06/20/14                            |
| e See Columns (a) thru (d)                                                                                                                  |  |                                                  |                                         |                                     |

| (e) Gross sales price      | (f) Depreciation allowed<br>(or allowable) | (g) Cost or other basis<br>plus expense of sale | (h) Gain or (loss)<br>(e) plus (f) minus (g) |
|----------------------------|--------------------------------------------|-------------------------------------------------|----------------------------------------------|
| a 87,029.                  |                                            | 80,841.                                         | 6,188.                                       |
| b 835.                     |                                            | 569.                                            | 266.                                         |
| c 15,399.                  |                                            | 10,808.                                         | 4,591.                                       |
| d 30,000.                  |                                            | 19,472.                                         | 10,528.                                      |
| e See Columns (e) thru (h) |                                            | 1,087,364.                                      | 73,796.                                      |

| Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 |                                      |                                                     | (j) Gains (Column (h)<br>gain minus column (k), but not less<br>than -0-) or Losses (from column (h)) |
|---------------------------------------------------------------------------------------------|--------------------------------------|-----------------------------------------------------|-------------------------------------------------------------------------------------------------------|
| (i) Fair Market Value<br>as of 12/31/69                                                     | (j) Adjusted basis<br>as of 12/31/69 | (k) Excess of column (i)<br>over column (j), if any |                                                                                                       |
| a                                                                                           |                                      |                                                     | 6,188.                                                                                                |
| b                                                                                           |                                      |                                                     | 266.                                                                                                  |
| c                                                                                           |                                      |                                                     | 4,591.                                                                                                |
| d                                                                                           |                                      |                                                     | 10,528.                                                                                               |
| e See Columns (i) thru (l)                                                                  |                                      |                                                     | 73,796.                                                                                               |

|                                                                                |                                                                                                                                                                                                          |  |   |         |
|--------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|---|---------|
| 2 Capital gain net income or (net capital loss)                                | <div style="border: 1px solid black; padding: 2px;">           If gain, also enter in Part I, line 7<br/>           If (loss), enter -0- in Part I, line 7         </div>                                |  | 2 | 95,369. |
| 3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) | <div style="border: 1px solid black; padding: 2px;">           If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0-<br/>           in Part I, line 8         </div> |  | 3 | 24,453. |

**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<br>Calendar year (or tax year<br>beginning in)                                        | (b) Adjusted qualifying distributions | (c) Net value of<br>noncharitable-use assets | (d) Distribution ratio<br>(column (b) divided by column (c)) |
| 2012                                                                                                        | 688,296.                              | 5,922,050.                                   | 0.116226                                                     |
| 2011                                                                                                        | 690,105.                              | 4,252,683.                                   | 0.162275                                                     |
| 2010                                                                                                        | 496,835.                              | 3,109,716.                                   | 0.159769                                                     |
| 2009                                                                                                        | 455,198.                              | 2,098,511.                                   | 0.216915                                                     |
| 2008                                                                                                        | 189,943.                              | 1,229,078.                                   | 0.154541                                                     |

|                                                                                                                                                                                   |   |            |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|------------|
| 2 Total of line 1, column (d)                                                                                                                                                     | 2 | 0.809726   |
| 3 Average distribution ratio for the 5-year base period — divide the total on line 2 by 5, or by the<br>number of years the foundation has been in existence if less than 5 years | 3 | 0.161945   |
| 4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5                                                                                                    | 4 | 7,485,854. |
| 5 Multiply line 4 by line 3                                                                                                                                                       | 5 | 1,212,297. |
| 6 Enter 1% of net investment income (1% of Part I, line 27b)                                                                                                                      | 6 | 2,713.     |
| 7 Add lines 5 and 6                                                                                                                                                               | 7 | 1,215,010. |
| 8 Enter qualifying distributions from Part XII, line 4                                                                                                                            | 8 | 684,992.   |

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)**

|                                                                                                                                                                                                                                   |     |   |        |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|---|--------|
| 1 a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter 'N/A' on line 1<br>Date of ruling or determination letter _____ (attach copy of letter if necessary — see instrs) |     |   |        |
| b Domestic foundations that meet the section 4940(e) requirements in Part V,<br>check here <input type="checkbox"/> and enter 1% of Part I, line 27b                                                                              |     | 1 | 5,425. |
| c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, column (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 | 5,425. |
| 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 | 5,425. |
| 6 Credits/Payments                                                                                                                                                                                                                |     |   |        |
| a 2013 estimated tax pmts and 2012 overpayment credited to 2013                                                                                                                                                                   | 6 a |   |        |
| b Exempt foreign organizations — tax withheld at source                                                                                                                                                                           | 6 b |   |        |
| c Tax paid with application for extension of time to file (Form 8868)                                                                                                                                                             | 6 c |   |        |
| d Backup withholding erroneously withheld                                                                                                                                                                                         | 6 d |   |        |
| 7 Total credits and payments Add lines 6a through 6d                                                                                                                                                                              | 7   |   |        |
| 8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached                                                                                                    | 8   |   | 121.   |
| 9 Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed                                                                                                                                                    | 9   |   | 5,546. |
| 10 Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid                                                                                                                                       | 10  |   | 0.     |
| 11 Enter the amount of line 10 to be Credited to 2014 estimated tax Refunded                                                                                                                                                      | 11  |   |        |

**Part VII-A Statements Regarding Activities**

|                                                                                                                                                                                                                                                                                                                                              | Yes | No |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|----|
| 1 a 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?                                                                                                                                                                     | 1 a | X  |
| b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)?<br>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 | 1 b | X  |
| c Did the foundation file Form 1120-POL for this year?                                                                                                                                                                                                                                                                                       | 1 c | X  |
| d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year<br>(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?<br>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  |
| 4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?                                                                                                                                                                                                                                              | 4 a | X  |
| b If 'Yes,' has it filed a tax return on Form 990-T for this year?                                                                                                                                                                                                                                                                           | 4 b |    |
| 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?<br>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<br>• By language in the governing instrument, or<br>• 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, column (c), and Part XIV.                                                                                                                                                                                                      | 7   | X  |
| 8 a Enter the states to which the foundation reports or with which it is registered (see instructions)                                                                                                                                                                                                                                       |     |    |
| 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                                                                                                                                | 8 b | 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  |

BAA

Form 990-PF (2013)

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

|                                                                                                                                                               |                                                                                                                                                                                                     |    |   |                          |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|---|--------------------------|
| 11                                                                                                                                                            | At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes', attach schedule (see instructions) . . . . .   | 11 |   | X                        |
| 12                                                                                                                                                            | Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If 'Yes,' attach statement (see instructions) . . . . .  | 12 |   | X                        |
| 13                                                                                                                                                            | Did the foundation comply with the public inspection requirements for its annual returns and exemption application? . . . . .                                                                       | 13 | X |                          |
| Website address . . . . . <u>WWW.BAMFORDFOUNDATION.ORG</u>                                                                                                    |                                                                                                                                                                                                     |    |   |                          |
| 14                                                                                                                                                            | The books are in care of <u>THE BAMFORD FOUNDATION</u> Telephone no <u>(253) 620-4743</u>                                                                                                           |    |   |                          |
|                                                                                                                                                               | Located at <u>PO BOX 2274</u> <u>TACOMA</u> <u>WA</u> ZIP + 4 <u>98401</u>                                                                                                                          |    |   |                          |
| 15                                                                                                                                                            | Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here . . . . .                                                                                       |    |   | <input type="checkbox"/> |
|                                                                                                                                                               | and enter the amount of tax-exempt interest received or accrued during the year . . . . .                                                                                                           | 15 |   |                          |
| 16                                                                                                                                                            | At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? . . . . . | 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 <u>                    </u> |                                                                                                                                                                                                     |    |   |                          |

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

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

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

BAA

Form 990-PF (2013)

**Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required** (continued)**5 a** 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)? . . . . . ☐**5 b**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)

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

**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? . . . . . ☐ Yes ☒ No

If 'Yes' to 6b, file Form 8870

**6 b**

X

**7 a** At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? . . . . . ☐ Yes ☒ No**b** If 'Yes,' did the foundation receive any proceeds or have any net income attributable to the transaction? . . . . . ☐ Yes ☒ No**7 b****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 |
|----------------------------------------------------------|-----------------------------------------------------------|-------------------------------------------|-----------------------------------------------------------------------|---------------------------------------|
| CALVIN BAMFORD JR<br>PO BOX 2274<br>TACOMA WA 98401      | PRES/TREAS<br>1.00                                        | 0.                                        | 0.                                                                    | 0.                                    |
| JOANNE BAMFORD<br>PO BOX 2274<br>TACOMA WA 98401         | VICE PRES/DIRECTOR<br>1.00                                | 0.                                        | 0.                                                                    | 0.                                    |
| HOLLY BAMFORD HUNT<br>PO BOX 2274<br>TACOMA WA 98401     | SECRETARY/DIRECTOR<br>20.00                               | 31,775.                                   | 0.                                                                    | 0.                                    |
| See Information about Officers, Directors, Trustees, Etc |                                                           | 0.                                        | 0.                                                                    | 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 . . . . . ☐

None

**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<br>-----<br>-----                                                               |                     |                  |
| -----<br>-----<br>-----                                                              |                     |                  |
| -----<br>-----<br>-----                                                              |                     |                  |
| -----<br>-----<br>-----                                                              |                     |                  |
| -----<br>-----<br>-----                                                              |                     |                  |
| Total number of others receiving over \$50,000 for professional services . . . . . ▶ |                     | None             |

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

| List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc. |  | Expenses |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|----------|
| 1                                                                                                                                                                                                                                                      |  |          |
| 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 |
|-------------------------------------------------------------------------------------------------------------------|--------|
| <b>1</b><br><div></div> <div></div>                                                                               |        |
| <b>2</b><br><div></div> <div></div>                                                                               |        |
| All other program-related investments. See instructions<br><b>3</b><br><div></div> <div></div>                    |        |
| <b>Total.</b> Add lines 1 through 3                                                                               |        |

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

|          |                                                                                                              |                       |
|----------|--------------------------------------------------------------------------------------------------------------|-----------------------|
| <b>1</b> | Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes   |                       |
| <b>a</b> | Average monthly fair market value of securities                                                              | <b>1 a</b> 7,228,324. |
| <b>b</b> | Average of monthly cash balances                                                                             | <b>1 b</b> 371,528.   |
| <b>c</b> | Fair market value of all other assets (see instructions)                                                     | <b>1 c</b>            |
| <b>d</b> | <b>Total</b> (add lines 1a, b, and c)                                                                        | <b>1 d</b> 7,599,852. |
| <b>e</b> | Reduction claimed for blockage or other factors reported on lines 1a and 1c<br>(attach detailed explanation) | <b>1 e</b>            |
| <b>2</b> | Acquisition indebtedness applicable to line 1 assets                                                         | <b>2</b>              |
| <b>3</b> | Subtract line 2 from line 1d                                                                                 | <b>3</b> 7,599,852.   |
| <b>4</b> | Cash deemed held for charitable activities. Enter 1-1/2% of line 3<br>(for greater amount, see instructions) | <b>4</b> 113,998.     |
| <b>5</b> | <b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4  | <b>5</b> 7,485,854.   |
| <b>6</b> | <b>Minimum investment return.</b> Enter 5% of line 5                                                         | <b>6</b> 374,293.     |

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

|            |                                                                                                         |                   |
|------------|---------------------------------------------------------------------------------------------------------|-------------------|
| <b>1</b>   | Minimum investment return from Part X, line 6                                                           | <b>1</b> 374,293. |
| <b>2 a</b> | Tax on investment income for 2013 from Part VI, line 5                                                  | <b>2 a</b> 5,425. |
| <b>b</b>   | Income tax for 2013 (This does not include the tax from Part VI)                                        | <b>2 b</b>        |
| <b>c</b>   | Add lines 2a and 2b                                                                                     | <b>2 c</b> 5,425. |
| <b>3</b>   | Distributable amount before adjustments Subtract line 2c from line 1                                    | <b>3</b> 368,868. |
| <b>4</b>   | Recoveries of amounts treated as qualifying distributions                                               | <b>4</b>          |
| <b>5</b>   | Add lines 3 and 4                                                                                       | <b>5</b> 368,868. |
| <b>6</b>   | Deduction from distributable amount (see instructions)                                                  | <b>6</b>          |
| <b>7</b>   | <b>Distributable amount as adjusted</b> Subtract line 6 from line 5 Enter here and on Part XIII, line 1 | <b>7</b> 368,868. |

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

|          |                                                                                                                                                         |                     |
|----------|---------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|
| <b>1</b> | Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes                                                               |                     |
| <b>a</b> | Expenses, contributions, gifts, etc — total from Part I, column (d), line 26                                                                            | <b>1 a</b> 684,992. |
| <b>b</b> | Program-related investments — total from Part IX-B.                                                                                                     | <b>1 b</b>          |
| <b>2</b> | Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes                                               | <b>2</b>            |
| <b>3</b> | Amounts set aside for specific charitable projects that satisfy the                                                                                     |                     |
| <b>a</b> | Suitability test (prior IRS approval required)                                                                                                          | <b>3 a</b>          |
| <b>b</b> | Cash distribution test (attach the required schedule)                                                                                                   | <b>3 b</b>          |
| <b>4</b> | <b>Qualifying distributions.</b> Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4                                        | <b>4</b> 684,992.   |
| <b>5</b> | Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income.<br>Enter 1% of Part I, line 27b (see instructions) | <b>5</b> 0.         |
| <b>6</b> | <b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4                                                                                   | <b>6</b> 684,992.   |

**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)<br>Corpus | (b)<br>Years prior to 2012 | (c)<br>2012 | (d)<br>2013 |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|----------------------------|-------------|-------------|
| <b>1</b> Distributable amount for 2013 from Part XI, line 7 . . . . .                                                                                                                       |               |                            |             | 368,868.    |
| <b>2</b> Undistributed income, if any, as of the end of 2013                                                                                                                                |               |                            |             |             |
| <b>a</b> Enter amount for 2012 only . . . . .                                                                                                                                               |               |                            |             |             |
| <b>b</b> Total for prior years 20 __, 20 __, 20 __                                                                                                                                          |               |                            |             |             |
| <b>3</b> Excess distributions carryover, if any, to 2013                                                                                                                                    |               |                            |             |             |
| <b>a</b> From 2008 . . . . .                                                                                                                                                                | 129,083.      |                            |             |             |
| <b>b</b> From 2009 . . . . .                                                                                                                                                                | 352,041.      |                            |             |             |
| <b>c</b> From 2010 . . . . .                                                                                                                                                                | 497,866.      |                            |             |             |
| <b>d</b> From 2011 . . . . .                                                                                                                                                                | 691,129.      |                            |             |             |
| <b>e</b> From 2012 . . . . .                                                                                                                                                                | 688,296.      |                            |             |             |
| <b>f</b> Total of lines 3a through e . . . . .                                                                                                                                              | 2,358,415.    |                            |             |             |
| <b>4</b> Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 684,992.                                                                                                              |               |                            |             |             |
| <b>a</b> Applied to 2012, but not more than line 2a . . . . .                                                                                                                               |               |                            |             |             |
| <b>b</b> Applied to undistributed income of prior years (Election required — see instructions) . . . . .                                                                                    |               |                            |             |             |
| <b>c</b> Treated as distributions out of corpus (Election required — see instructions) . . . . .                                                                                            |               |                            |             |             |
| <b>d</b> Applied to 2013 distributable amount . . . . .                                                                                                                                     |               |                            |             |             |
| <b>e</b> Remaining amount distributed out of corpus . . . . .                                                                                                                               | 684,992.      |                            |             |             |
| <b>5</b> Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a)) . . . . .                                         |               |                            |             |             |
| <b>6</b> Enter the net total of each column as indicated below:                                                                                                                             |               |                            |             |             |
| <b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5 . . . . .                                                                                                                          | 3,043,407.    |                            |             |             |
| <b>b</b> Prior years' undistributed income Subtract line 4b from line 2b . . . . .                                                                                                          |               | 0.                         |             |             |
| <b>c</b> Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed . . . . . |               |                            |             |             |
| <b>d</b> Subtract line 6c from line 6b. Taxable amount — see instructions . . . . .                                                                                                         |               | 0.                         |             |             |
| <b>e</b> Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount — see instructions . . . . .                                                                            |               |                            | 0.          |             |
| <b>f</b> Undistributed income for 2013 Subtract lines 4d and 5 from line 1. This amount must be distributed in 2014 . . . . .                                                               |               |                            |             | 368,868.    |
| <b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions) . . . . .                                  |               |                            |             |             |
| <b>8</b> Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions) . . . . .                                                                              | 129,083.      |                            |             |             |
| <b>9</b> Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a . . . . .                                                                                              | 2,914,324.    |                            |             |             |
| <b>10</b> Analysis of line 9                                                                                                                                                                |               |                            |             |             |
| <b>a</b> Excess from 2009 . . . . .                                                                                                                                                         | 352,041.      |                            |             |             |
| <b>b</b> Excess from 2010 . . . . .                                                                                                                                                         | 497,866.      |                            |             |             |
| <b>c</b> Excess from 2011 . . . . .                                                                                                                                                         | 691,129.      |                            |             |             |
| <b>d</b> Excess from 2012 . . . . .                                                                                                                                                         | 688,296.      |                            |             |             |
| <b>e</b> Excess from 2013 . . . . .                                                                                                                                                         | 684,992.      |                            |             |             |

N/A

**b** Check box to indicate whether the foundation is a private operating foundation described in section

4942(1)(5)

**b 85% of line 2a . . . . .**

| (1) | (2) | (3) | (4) | (5) |
|-----|-----|-----|-----|-----|
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## 1 Information Regarding Foundation Managers:

JOANNE BAMFORD

NONE

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.

N/A

N/A

N/A

N/A

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

| Recipient<br>Name and address (home or business)                                               | If recipient is an individual,<br>show any relationship to any<br>foundation manager or<br>substantial contributor | Foundation<br>status of<br>recipient | Purpose of grant or<br>contribution           | Amount   |
|------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|--------------------------------------|-----------------------------------------------|----------|
| <b>a Paid during the year</b>                                                                  |                                                                                                                    |                                      |                                               |          |
| AIDS HOUSING ASSOCIATION OF TACOMA<br>301 NORTH L STREET<br>TACOMA WA 98403                    |                                                                                                                    | 509(A) (1)<br>PUBLIC<br>CHARITY      | GENERAL SUPPORT                               | 3,000.   |
| ANNIE WRIGHT SCHOOL<br>827 N TACOMA AVENUE<br>TACOMA WA 98403                                  |                                                                                                                    | 170 (B)<br>(1) (A) (II)<br>SCHOOL    | SUPPORT EDUCATION                             | 30,000.  |
| ARK INSTITUTE OF LEARNING<br>1916 S WASHINGTON STREET<br>TACOMA WA 98405                       |                                                                                                                    | 509(A) (1)<br>PUBLIC<br>CHARITY      | SUPPORT EDUCATION<br>SCHOLARSHIP FUND         | 2,660.   |
| ARTS EDUCATION OF WASHINGTON<br>158 THOMAS STREET STE 16<br>SEATTLE WA 98109                   |                                                                                                                    | 509(A) (1)<br>PUBLIC<br>CHARITY      | PROGRAM SUPPORT<br>ARTS EDUCATIONIN CLASSROOM | 20,000.  |
| ASSOCIATED MINISTRIES<br>1224 SOUTH I STREET<br>TACOMA WA 98405                                |                                                                                                                    | 509(A) (1)<br>PUBLIC<br>CHARITY      | PROGRAM SUPPORT<br>ACCESS 4 POINT HOUSING     | 1,000.   |
| AT THE CROSSROADS<br>333 VALENCIA ST #320<br>SAN FRANCISCO CA 94103                            |                                                                                                                    | 509(A) (1)<br>PUBLIC<br>CHARITY      | PROGRAM SUPPORT<br>OUTREACH AND COUNSELING    | 5,000.   |
| BETHEL COMMUNITY SERVICES<br>18020 EAST B STREET<br>SPANAWAY WA 98387                          |                                                                                                                    | 509(A) (1)<br>PUBLIC<br>CHARITY      | PROGRAM SUPPORT<br>FAMILY AND YOUTH           | 5,000.   |
| BOYS AND GIRLS CLUB OF SOUTH PUGET SOUND<br>3875 SOUTH 66TH STREET, STE 101<br>TACOMA WA 98409 |                                                                                                                    | 509(A) (1)<br>PUBLIC<br>CHARITY      | GREAT FUTURES<br>INTERN SCHOLARSHIP           | 45,000.  |
| CHARLES WRIGHT ACADEMY<br>7723 CHAMBERS CREEK ROAD W<br>TACOMA WA 98467                        |                                                                                                                    | 170 (B)<br>(1) (A) (II)<br>SCHOOL    | SUPPORT EDUCATION                             | 1,500.   |
| See Line 3a statement                                                                          |                                                                                                                    |                                      |                                               | 533,981. |
| <b>Total</b>                                                                                   |                                                                                                                    |                                      | <b>3 a</b>                                    | 647,141. |
| <b>b Approved for future payment</b>                                                           |                                                                                                                    |                                      |                                               |          |
|                                                                                                |                                                                                                                    |                                      |                                               |          |
| <b>Total</b>                                                                                   |                                                                                                                    |                                      | <b>3 b</b>                                    |          |

**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)<br>Related or exempt<br>function income<br>(See instructions ) |
|------------------------------------------------|--------------------------------------------------------------|---------------------------|---------------|--------------------------------------|---------------|--------------------------------------------------------------------|
|                                                |                                                              | (a)<br>Business<br>code   | (b)<br>Amount | (c)<br>Exclu-<br>sion<br>code        | (d)<br>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 . . . .   |                           |               |                                      |               |                                                                    |
| 4                                              | Dividends and interest from securities . . . . .             |                           |               | 14                                   | 193,113.      |                                                                    |
| 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 . . |                           |               |                                      |               |                                                                    |
| 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) . . . . .             |                           |               |                                      | 193,113.      |                                                                    |
| 13                                             | Total. Add line 12, columns (b), (d), and (e) . . . . .      |                           |               |                                      | 13            | 193,113.                                                           |

(See worksheet in line 13 instructions to verify calculations )

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

[illegible]



Form 990-PF, Page 1, Part I, Line 18

**Line 18 Stmt**

| Taxes            | Rev/Exp Book  | Net Inv Inc   | Adj Net Inc | Charity Disb  |
|------------------|---------------|---------------|-------------|---------------|
| EXISE TAXES/FEES | 2,316.        | 2,291.        |             | 25.           |
| PAYROLL TAXES    | 2,168.        |               |             | 2,168.        |
| <b>Total</b>     | <b>4,484.</b> | <b>2,291.</b> |             | <b>2,193.</b> |

Form 990-PF, Part IV, Capital Gains and Losses for Tax on Investment Income

**Columns (a) thru (d)**

| (a)<br>List and describe the kind(s) of property sold<br>(e g., real estate, 2-story brick warehouse; or<br>common stock, 200 shares MLC Company) | (b)<br>How acquired<br>P — Purchase<br>D — Donation | (c)<br>Date acquired<br>(month,<br>day, year) | (d)<br>Date sold<br>(month,<br>day, year) |
|---------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------|-----------------------------------------------|-------------------------------------------|
| 1316.369 SHARES US GLOBAL INVESTORS RESOURCES                                                                                                     | P                                                   | 02/13/09                                      | 04/28/14                                  |
| 33493.044 SHARES PIMCO TOTAL RETURN                                                                                                               | P                                                   | 01/04/10                                      | 10/14/14                                  |
| 287.043 SHARES E.I.I. GLOBAL PROPERTY                                                                                                             | P                                                   | 01/04/10                                      | 08/25/14                                  |
| 5453.812 SHARES E.I.I. GLOBAL PROPERTY                                                                                                            | P                                                   | 01/04/10                                      | 08/07/14                                  |
| 323.206 SHARES ABERDEEN EMERGING MARKETS                                                                                                          | P                                                   | 12/31/12                                      | 06/26/14                                  |
| 876.808 SHARE DIAMOND HILL LARGE-CAP                                                                                                              | P                                                   | 12/31/13                                      | 06/26/14                                  |
| 418.976 SHARES HARBOR INTERNATIONAL                                                                                                               | P                                                   | 09/18/13                                      | 06/26/14                                  |
| 277.463 SHARES LONGLEAF PARTNERS SMALL-CAP                                                                                                        | P                                                   | 11/06/13                                      | 06/26/14                                  |
| 2463.295 SHARES PIMCO COMMODITY REAL RETURN STRATEGY                                                                                              | P                                                   | 01/05/12                                      | 06/26/14                                  |
| 425.306 SHARES SCOUT INTERNATIONAL                                                                                                                | P                                                   | 12/31/13                                      | 06/26/14                                  |
| 528.984 SHARES VANGUARD LARGE CAP INDEX                                                                                                           | P                                                   | 12/31/13                                      | 06/26/14                                  |
| 349.162 SHARES WILLIAM BLAIR EMERGING MARKETS                                                                                                     | P                                                   | 12/31/12                                      | 06/26/14                                  |
| 2893.975 SHARES VANGUARD LARGE-CAP INDEX                                                                                                          | P                                                   | 12/31/13                                      | 05/07/14                                  |
| 11649.819 SHARES US GLOBAL INVESTORS RESOURCES                                                                                                    | P                                                   | 01/04/10                                      | 04/28/14                                  |
| 4587.156 SHARES DIAMOND HILL LARGE-CAP                                                                                                            | P                                                   | 01/05/12                                      | 12/13/13                                  |
| 2114.662 SHARES VANGUARD GROWTH INDEX                                                                                                             | P                                                   | 12/31/12                                      | 12/13/13                                  |
| 7929.119 SHARES PIMCO TOTAL RETURN                                                                                                                | P                                                   | 01/05/12                                      | 10/14/14                                  |
| 67.72 SHARES E.I.I. GLOBAL PROPERTY                                                                                                               | P                                                   | 01/05/12                                      | 08/25/14                                  |
| 1286.687 SHARES E.I.I. GLOBAL PROPERTY                                                                                                            | P                                                   | 01/05/12                                      | 08/07/14                                  |
| 2750.009 SHARES US GLOBAL INVESTORS RESOURCES                                                                                                     | P                                                   | 01/05/12                                      | 04/28/14                                  |
| 137.615 SHARES DIAMOND HILL LARGE-CAP                                                                                                             | P                                                   | 12/31/12                                      | 12/13/13                                  |

Form 990-PF, Part IV, Capital Gains and Losses for Tax on Investment Income

**Columns (e) thru (h)**

| (e)<br>Gross sales<br>price | (f)<br>Depreciation allowed<br>(or allowable) | (g)<br>Cost or other basis<br>plus expense of sale | (h)<br>Gain or (loss)<br>(e) plus (f) minus (g) |
|-----------------------------|-----------------------------------------------|----------------------------------------------------|-------------------------------------------------|
| 12,571.                     |                                               | 8,000.                                             | 4,571.                                          |
| 367,419.                    |                                               | 366,795.                                           | 624.                                            |
| 5,319.                      |                                               | 3,677.                                             | 1,642.                                          |
| 98,060.                     |                                               | 83,253.                                            | 14,807.                                         |
| 5,000.                      |                                               | 5,126.                                             | -126.                                           |
| 20,000.                     |                                               | 18,922.                                            | 1,078.                                          |
| 31,000.                     |                                               | 29,788.                                            | 1,212.                                          |
| 9,800.                      |                                               | 10,050.                                            | -250.                                           |
| 15,100.                     |                                               | 16,349.                                            | -1,249.                                         |
| 16,000.                     |                                               | 15,847.                                            | 153.                                            |

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

Continued

| (e)<br>Gross sales<br>price | (f)<br>Depreciation allowed<br>(or allowable) | (g)<br>Cost or other basis<br>plus expense of sale | (h)<br>Gain or (loss)<br>(e) plus (f) minus (g) |
|-----------------------------|-----------------------------------------------|----------------------------------------------------|-------------------------------------------------|
| 24,000.                     |                                               | 22,643.                                            | 1,357.                                          |
| 5,000.                      |                                               | 4,714.                                             | 286.                                            |
| 110,000.                    |                                               | 108,061.                                           | 1,939.                                          |
| 111,256.                    |                                               | 109,677.                                           | 1,579.                                          |
| 100,000.                    |                                               | 75,615.                                            | 24,385.                                         |
| 90,000.                     |                                               | 71,750.                                            | 18,250.                                         |
| 86,982.                     |                                               | 87,311.                                            | -329.                                           |
| 1,255.                      |                                               | 913.                                               | 342.                                            |
| 23,135.                     |                                               | 20,387.                                            | 2,748.                                          |
| 26,263.                     |                                               | 26,200.                                            | 63.                                             |
| 3,000.                      |                                               | 2,286.                                             | 714.                                            |
| Total                       |                                               | <u>1,087,364.</u>                                  | <u>73,796.</u>                                  |

Form 990-PF, Part IV, Capital Gains and Losses for Tax on Investment Income  
Columns (i) thru (l)Complete only for assets showing gain in column (h) and owned  
by the foundation on 12/31/69

| (i)<br>Fair Market Value<br>as of 12/31/69 | (j)<br>Adjusted basis<br>as of 12/31/69 | (k)<br>Excess of column (i)<br>over column (j), if any | (l)<br>Gains (column (h)<br>gain minus column (k),<br>but not less than -0-)<br>or losses (from<br>column (h)) |
|--------------------------------------------|-----------------------------------------|--------------------------------------------------------|----------------------------------------------------------------------------------------------------------------|
|                                            |                                         |                                                        | 4,571.                                                                                                         |
|                                            |                                         |                                                        | 624.                                                                                                           |
|                                            |                                         |                                                        | 1,642.                                                                                                         |
|                                            |                                         |                                                        | 14,807.                                                                                                        |
|                                            |                                         |                                                        | -126.                                                                                                          |
|                                            |                                         |                                                        | 1,078.                                                                                                         |
|                                            |                                         |                                                        | 1,212.                                                                                                         |
|                                            |                                         |                                                        | -250.                                                                                                          |
|                                            |                                         |                                                        | -1,249.                                                                                                        |
|                                            |                                         |                                                        | 153.                                                                                                           |
|                                            |                                         |                                                        | 1,357.                                                                                                         |
|                                            |                                         |                                                        | 286.                                                                                                           |
|                                            |                                         |                                                        | 1,939.                                                                                                         |
|                                            |                                         |                                                        | 1,579.                                                                                                         |
|                                            |                                         |                                                        | 24,385.                                                                                                        |
|                                            |                                         |                                                        | 18,250.                                                                                                        |
|                                            |                                         |                                                        | -329.                                                                                                          |
|                                            |                                         |                                                        | 342.                                                                                                           |
|                                            |                                         |                                                        | 2,748.                                                                                                         |
|                                            |                                         |                                                        | 63.                                                                                                            |
|                                            |                                         |                                                        | 714.                                                                                                           |
| Total                                      |                                         |                                                        | <u>73,796.</u>                                                                                                 |

Form 990-PF, Page 6, Part VIII, Line 1

**Information about Officers, Directors, Trustees, Etc.**

| (a)<br>Name and address                                                                                                                 | (b)<br>Title, and<br>average hours<br>per week<br>devoted to<br>position | (c)<br>Compensation<br>(If not paid,<br>enter -0-) | (d)<br>Contributions<br>to employee<br>benefit plans<br>and deferred<br>compensation | (e)<br>Expense<br>account, other<br>allowances |
|-----------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------|----------------------------------------------------|--------------------------------------------------------------------------------------|------------------------------------------------|
| Person . . <input checked="" type="checkbox"/> Business . <input type="checkbox"/><br>DREW BAMFORD<br>PO BOX 2274<br>TACOMA WA 98401    | DIRECTOR<br>1.00                                                         | 0.                                                 | 0.                                                                                   | 0.                                             |
| Person . . <input checked="" type="checkbox"/> Business . <input type="checkbox"/><br>HEATHER BAMFORD<br>PO BOX 2274<br>TACOMA WA 98401 | DIRECTOR<br>1.00                                                         | 0.                                                 | 0.                                                                                   | 0.                                             |

Total

0.      0.      0.

Form 990-PF, Page 11, Part XV, line 3a

**Line 3a statement**

| Recipient<br><br>Name and address<br>(home or business)                                  | If recipient is<br>an individual,<br>show any<br>relationship to<br>any foundation<br>manager or<br>substantial<br>contributor | Founda-<br>tion<br>status<br>of re-<br>cipient | Purpose of<br>grant or contribution     | Person or<br>Business<br>Checkbox<br><br>Amount                                               |
|------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------|-----------------------------------------|-----------------------------------------------------------------------------------------------|
| <b>a Paid during the year</b>                                                            |                                                                                                                                |                                                |                                         |                                                                                               |
| CHILD CARE AWARE OF TACOMA/PIERCE COUNTY<br>1501 PACIFIC AVE, STE 305<br>TACOMA WA 98402 | -----                                                                                                                          | 509(A)(1)<br>PUBLIC<br>CHARITY                 | SUPPORT CHILD CARE<br>SCHOLARSHIP LUNCH | Person or <input type="checkbox"/><br>Business <input checked="" type="checkbox"/><br>250.    |
| CHILDREN'S MUSEUM OF TACOMA<br>1501 PACIFIC AVE, STE 202<br>TACOMA WA 98401              | -----                                                                                                                          | 509(A)(1)<br>PUBLIC<br>CHARITY                 | GENERAL OPERATING &<br>OUTREACH SUPPORT | Person or <input type="checkbox"/><br>Business <input checked="" type="checkbox"/><br>20,981. |
| COLLEGE SUCCESS FOUNDATION<br>950 PACIFIC AVENUE<br>TACOMA WA 98402                      | -----                                                                                                                          | 509(A)(1)<br>PUBLIC<br>CHARITY                 | PROGRAM SUPPORT<br>HERO PROGRAM         | Person or <input type="checkbox"/><br>Business <input checked="" type="checkbox"/><br>1,500.  |
| COMMUNITY HEALTH CARE<br>1019 PACIFIC AVE, STE 300<br>TACOMA WA 98402                    | -----                                                                                                                          | 509(A)(1)<br>PUBLIC<br>CHARITY                 | CAPITAL SUPPORT<br>HEALTH CENTER        | Person or <input type="checkbox"/><br>Business <input checked="" type="checkbox"/><br>12,500. |
| DASH CENTER FOR THE ARTS<br>1102 A STREET<br>TACOMA WA 98401                             | -----                                                                                                                          | 509(A)(1)<br>PUBLIC<br>CHARITY                 | CAPACITY BUILDING<br>SUPPORT            | Person or <input type="checkbox"/><br>Business <input checked="" type="checkbox"/><br>10,000. |
| EMERGENCY FOOD NETWORK<br>3318 92ND STREET SOUTH<br>TACOMA WA 98499                      | -----                                                                                                                          | 509(A)(1)<br>PUBLIC<br>CHARITY                 | PROGRAM SUPPORT                         | Person or <input type="checkbox"/><br>Business <input checked="" type="checkbox"/><br>5,000.  |

Form 990-PF, Page 11, Part XV, line 3a  
Line 3a statement

Continued

| Recipient<br><br>Name and address<br>(home or business)                             | If recipient is<br>an individual,<br>show any<br>relationship to<br>any foundation<br>manager or<br>substantial<br>contributor | Founda-<br>tion<br>status<br>of re-<br>cipient | Purpose of<br>grant or contribution        | Person or<br>Business<br>Checkbox<br><br>Amount                                               |
|-------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------|--------------------------------------------|-----------------------------------------------------------------------------------------------|
| <b>a Paid during the year</b>                                                       |                                                                                                                                |                                                |                                            |                                                                                               |
| FISH FOOD BANKS<br>621 TACOMA AVE SOUTH, STE 202<br>TACOMA WA 98402                 |                                                                                                                                | 509(A)(1)<br>PUBLIC<br>CHARITY                 | PROGRAM SUPPORT                            | Person or <input type="checkbox"/><br>Business <input checked="" type="checkbox"/><br>2,500.  |
| FOSS WATERWAY SEAPORT<br>705 DOCK STREET<br>TACOMA WA 98402                         |                                                                                                                                | 509(A)(1)<br>PUBLIC<br>CHARITY                 | EDUCATION PROGRAM                          | Person or <input type="checkbox"/><br>Business <input checked="" type="checkbox"/><br>40,000. |
| FRANCISCAN FOUNDATION<br>PO BOX 1502<br>TACOMA WA 98421                             |                                                                                                                                | 509(A)(2)<br>PUBLIC<br>CHARITY                 | CAPITAL SUPPORT                            | Person or <input type="checkbox"/><br>Business <input checked="" type="checkbox"/><br>10,000. |
| GOODWILL FOUNDATION<br>714 SOUTH 27TH STREET<br>TACOMA WA 98409                     |                                                                                                                                | 509(A)(1)<br>PUBLIC<br>CHARITY                 | PROGRAM SUPPORT<br>SCHOLARSHIP SUPPORT     | Person or <input type="checkbox"/><br>Business <input checked="" type="checkbox"/><br>5,000.  |
| GREATER TACOMA COMMUNITY FOUNDATION<br>950 PACIFIC AVE, STE 1100<br>TACOMA WA 98122 |                                                                                                                                | 509(A)(1)<br>PUBLIC<br>CHARITY                 | GENERAL SUPPORT                            | Person or <input type="checkbox"/><br>Business <input checked="" type="checkbox"/><br>65,500. |
| GREATER METRO PARKS FOUNDATION<br>4702 SOUTH 19TH STREET<br>TACOMA WA 98405         |                                                                                                                                | 509(A)(1)<br>PUBLIC<br>CHARITY                 | PROGRAM SUPPORT                            | Person or <input type="checkbox"/><br>Business <input checked="" type="checkbox"/><br>12,500. |
| HILLTOP ARTISTS<br>PO BOX 6829<br>TACOMA WA 98417                                   |                                                                                                                                | 509(A)(1)<br>PUBLIC<br>CHARITY                 | SCHOLARSHIP SUPPORT<br>AFTERSCHOOL PROGRAM | Person or <input type="checkbox"/><br>Business <input checked="" type="checkbox"/><br>5,350.  |
| HOPE SPARKS<br>6424 NORTH 9TH STREET<br>TACOMA WA 98406                             |                                                                                                                                | 509(A)(1)<br>PUBLIC<br>CHARITY                 | GENERAL SUPPORT                            | Person or <input type="checkbox"/><br>Business <input checked="" type="checkbox"/><br>1,000.  |
| JOB CARR CABIN MUSEUM<br>PO BOX 7609<br>TACOMA WA 98406                             |                                                                                                                                | 509(A)(1)<br>PUBLIC<br>CHARITY                 | EDUCATION PROGRAM<br>SUPPORT               | Person or <input type="checkbox"/><br>Business <input checked="" type="checkbox"/><br>300.    |
| JUVENILE DIABETES RESEARCH FOUNDATION<br>1215 4TH AVE, #1400<br>SEATTLE WA 98161    |                                                                                                                                | 509(A)(1)<br>PUBLIC<br>CHARITY                 | GENERAL SUPPORT                            | Person or <input type="checkbox"/><br>Business <input checked="" type="checkbox"/><br>1,000.  |
| LEMAY MUSEUM<br>PO BOX 1117<br>TACOMA WA 98401                                      |                                                                                                                                | 509(A)(1)<br>PUBLIC<br>CHARITY                 | GENERAL SUPPORT                            | Person or <input type="checkbox"/><br>Business <input checked="" type="checkbox"/><br>2,000.  |
| LINDQUIST DENTAL CLINIC<br>130 131ST STREET<br>TACOMA WA 98444                      |                                                                                                                                | 509(A)(1)<br>PUBLIC<br>CHARITY                 | GENERAL SUPPORT<br>AND SCHOLARSHIPS        | Person or <input type="checkbox"/><br>Business <input checked="" type="checkbox"/><br>10,000. |
| MARY BRIDGE CHILDREN'S FOUNDATION<br>PO BOX 5296<br>TACOMA WA 98415                 |                                                                                                                                | 509(A)(1)<br>HOSPITAL                          | GENERAL SUPPORT                            | Person or <input type="checkbox"/><br>Business <input checked="" type="checkbox"/><br>3,000.  |
| MUSEUM OF GLASS<br>1801 DOCK STREET<br>TACOMA WA 98402                              |                                                                                                                                | 509(A)(2)<br>PUBLIC<br>CHARITY                 | PROGRAM SUPPORT                            | Person or <input type="checkbox"/><br>Business <input checked="" type="checkbox"/><br>22,500. |
| NEIGHBORHOOD CLINIC<br>1323 SOUTH YAKIMA<br>TACOMA WA 98405                         |                                                                                                                                | 509(A)(1)<br>PUBLIC<br>CHARITY                 | GENERAL SUPPORT                            | Person or <input type="checkbox"/><br>Business <input checked="" type="checkbox"/><br>2,000.  |

Form 990-PF, Page 11, Part XV, line 3a

Continued

## Line 3a statement

| Recipient<br><br>Name and address<br>(home or business)                              | If recipient is<br>an individual,<br>show any<br>relationship to<br>any foundation<br>manager or<br>substantial<br>contributor | Founda-<br>tion<br>status<br>of re-<br>cipient | Purpose of<br>grant or contribution                  | Person or<br>Business<br>Checkbox<br><br>Amount                                               |
|--------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------|------------------------------------------------------|-----------------------------------------------------------------------------------------------|
| <b>a Paid during the year</b>                                                        |                                                                                                                                |                                                |                                                      |                                                                                               |
| NORTHWEST FURNITURE BANK<br>117 PUYALLUP AVENUE<br>TACOMA WA 98421                   |                                                                                                                                | 509(A)(1)<br>PUBLIC<br>CHARITY                 | GENERAL SUPPORT &<br>CAPITAL CAMPAIGN                | Person or <input type="checkbox"/><br>Business <input checked="" type="checkbox"/><br>25,000. |
| NORTHWEST LEADERSHIP FOUNDATION<br>717 TACOMA AVENUE SOUTH, STE A<br>TACOMA WA 98405 |                                                                                                                                | 509(A)(1)<br>PUBLIC<br>CHARITY                 | PROGRAM SUPPORT<br>ACT SIX SCHOLARS                  | Person or <input type="checkbox"/><br>Business <input checked="" type="checkbox"/><br>15,000. |
| PEACE COMMUNITY CENTER<br>2106 SOUTH CUSHMAN<br>TACOMA WA 98405                      |                                                                                                                                | 509(A)(1)<br>PUBLIC<br>CHARTY                  | PROGRAM SUPPORT                                      | Person or <input type="checkbox"/><br>Business <input checked="" type="checkbox"/><br>7,500.  |
| PHILANTHROPY NORTHWEST<br>2101 FOURTH AVE, STE 650<br>SEATTLE WA 98121               |                                                                                                                                | 509(A)(1)<br>PUBLIC<br>CHARITY                 | GENERAL SUPPORT                                      | Person or <input type="checkbox"/><br>Business <input checked="" type="checkbox"/><br>3,000.  |
| PIERCE COUNTY PROJECT ACCESS<br>223 TACOMA AVENUE SOUTH<br>TACOMA WA 98402           |                                                                                                                                | 509(A)(1)<br>PUBLIC<br>CHARITY                 | GENERAL SUPPORT                                      | Person or <input type="checkbox"/><br>Business <input checked="" type="checkbox"/><br>5,000.  |
| PIERCE COLLEGE FOUNDATION<br>1601 39TH AVE SE<br>PUYALLUP WA 98374                   |                                                                                                                                | 509(A)(1)<br>PUBLIC<br>CHARITY                 | PROGRAM SUPPORT<br>VETERAN STUDENT<br>SUPPORT CENTER | Person or <input type="checkbox"/><br>Business <input checked="" type="checkbox"/><br>10,000. |
| RALLY POINT 6<br>9881 BRIDGEPORT WAY SW<br>LAKEWOOD WA 98499                         |                                                                                                                                | 509(A)(1)<br>PUBLIC<br>CHARITY                 | CAPITAL CAMPAIGN                                     | Person or <input type="checkbox"/><br>Business <input checked="" type="checkbox"/><br>20,000. |
| REACH OUT AND READ WASHINGTON STATE<br>115 NE 100TH ST, STE 301<br>SEATTLE WA 98125  |                                                                                                                                | 509(A)(1)<br>PUBLIC<br>CHARITY                 | PROGRAM SUPPORT<br>PIERCE COUNTY PROGRAM             | Person or <input type="checkbox"/><br>Business <input checked="" type="checkbox"/><br>15,000. |
| RESCUE MISSION<br>PO BOX 1912<br>TACOMA WA 98401                                     |                                                                                                                                | 509(A)(1)<br>PUBLIC<br>CHARITY                 | GENERAL SUPPORT                                      | Person or <input type="checkbox"/><br>Business <input checked="" type="checkbox"/><br>1,000.  |
| SAFE STREETS CAMPAIGN<br>622 TACOMA AVE SOUTH, 1ST FLOOR<br>TACOMA WA 98402          |                                                                                                                                | 509(A)(1)<br>PUBLIC<br>CHARITY                 | PROGRAM SUPPORT<br>SUPPORT YOUTH<br>LEADING CHANGE   | Person or <input type="checkbox"/><br>Business <input checked="" type="checkbox"/><br>15,000. |
| ST LEO FOOD CONNECTION<br>710 SOUTH 13TH STREET<br>TACOMA WA 98405                   |                                                                                                                                | 509(A)(1)<br>PUBLIC<br>CHARITY                 | PROGRAM SUPPORT<br>CHILDREN'S FOOD PROGRAM           | Person or <input type="checkbox"/><br>Business <input checked="" type="checkbox"/><br>2,500.  |
| SUSAN G. KOMAN PUGET SOUND AFFILIATE<br>112 FIFTH AVENUE<br>SEATTLE WA 98109         |                                                                                                                                | 509(A)(1)<br>PUBLIC<br>CHARITY                 | GENERAL SUPPORT                                      | Person or <input type="checkbox"/><br>Business <input checked="" type="checkbox"/><br>500.    |
| TACOMA ART MUSEUM<br>1701 PACIFIC AVENUE<br>TACOMA WA 98402                          |                                                                                                                                | 509(A)(2)<br>PUBLIC<br>CHARITY                 | GENERAL SUPPORT &<br>CAPITAL CAMPAIGN                | Person or <input type="checkbox"/><br>Business <input checked="" type="checkbox"/><br>35,250. |
| TACOMA COMMUNITY COLLEGE FOUNDATION<br>6501 SOUTH 19TH STREET<br>TACOMA WA 98466     |                                                                                                                                | 509(A)(1)<br>PUBLIC<br>CHARITY                 | SCHOLARSHIP FUND                                     | Person or <input type="checkbox"/><br>Business <input checked="" type="checkbox"/><br>500.    |
| TACOMA COMMUNITY HOUSE<br>1314 SOUTH L STREET<br>TACOMA WA 98415                     |                                                                                                                                | 509(A)(1)<br>PUBLIC<br>CHARITY                 | GENERAL SUPPORT                                      | Person or <input type="checkbox"/><br>Business <input checked="" type="checkbox"/><br>9,500.  |

Form 990-PF, Page 11, Part XV, line 3a  
Line 3a statement

Continued

| Recipient<br>Name and address<br>(home or business)                               | If recipient is<br>an individual,<br>show any<br>relationship to<br>any foundation<br>manager or<br>substantial<br>contributor | Founda-<br>tion<br>status<br>of re-<br>cipient | Purpose of<br>grant or contribution                          | Person or<br>Business<br>Checkbox<br><br>Amount                                               |
|-----------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------|--------------------------------------------------------------|-----------------------------------------------------------------------------------------------|
| <b>a Paid during the year</b>                                                     |                                                                                                                                |                                                |                                                              |                                                                                               |
| TACOMA HOUSING DEVELOPMENT GROUP<br>902 SOUTH L STREET<br>TACOMA WA 98405         | -----                                                                                                                          | 509(A)(1)<br>PUBLIC<br>CHARITY                 | PROGRAM SUPPORT<br>ASSET BUILDING FOR<br>CHILDREN AND YOUTH  | Person or <input type="checkbox"/><br>Business <input checked="" type="checkbox"/><br>45,850. |
| TACOMA SYMPHONY ORCHESTRA<br>901 BROADWAY, STE 600<br>TACOMA WA 98402             | -----                                                                                                                          | 509(A)(1)<br>PUBLIC<br>CHARITY                 | PROGRAM SUPPORT<br>FAMILY CONCERT SERIES                     | Person or <input type="checkbox"/><br>Business <input checked="" type="checkbox"/><br>7,500.  |
| TRINITY PRESBYTERIAN CHURCH<br>1615 6TH AVENUE<br>TACOMA WA 98405                 | -----                                                                                                                          | 509(A)(1)<br>PUBLIC<br>CHARITY                 | PROGRAM SUPPORT<br>EDUCATION & OUTREACH                      | Person or <input type="checkbox"/><br>Business <input checked="" type="checkbox"/><br>7,500.  |
| UNITED WAY OF PIERCE COUNTY<br>1501 PACIFIC AVE<br>TACOMA WA 98402                | -----                                                                                                                          | 509(A)(1)<br>PUBLIC<br>CHARITY                 | COMMUNITY SOLUTIONS<br>FUND SUPPORT                          | Person or <input type="checkbox"/><br>Business <input checked="" type="checkbox"/><br>15,000. |
| UNIVERSITY OF WASHINGTON FOUNDATION<br>4333 BROOKLYN AVE NE<br>SEATTLE WA 98195   | -----                                                                                                                          | 501(C)(3)<br>PUBLIC<br>CHARITY                 | PROGRAM SUPPORT<br>GLOBAL HONORS &<br>WHOLE CHILD INITIATIVE | Person or <input type="checkbox"/><br>Business <input checked="" type="checkbox"/><br>20,000. |
| UW TACOMA MILGARD SCHOOL OF BUSINESS<br>1900 COMMERCE STREET<br>TACOMA WA 98402   | -----                                                                                                                          | 501(C)(3)<br>PUBLIC<br>CHARITY                 | GENERAL SUPPORT                                              | Person or <input type="checkbox"/><br>Business <input checked="" type="checkbox"/><br>6,000.  |
| WASHINGTON STATE CCR&R NETWORK<br>1551 BROADWAY, STE 301<br>TACOMA WA 98402       | -----                                                                                                                          | 509(A)(1)<br>PUBLIC<br>CHARITY                 | SCHOLARSHIP SUPPORT                                          | Person or <input type="checkbox"/><br>Business <input checked="" type="checkbox"/><br>5,000.  |
| WASHINGTON BUSINESS WEEK<br>33305 1ST WAY SOUTH, STE B212<br>FEDERAL WAY WA 98003 | -----                                                                                                                          | 509(A)(1)<br>PUBLIC<br>CHARITY                 | SCHOLARSHIP SUPPORT                                          | Person or <input type="checkbox"/><br>Business <input checked="" type="checkbox"/><br>12,000. |
| WORLD VISION U.S. PROGRAMS<br>PO BOX 9716 - MS 475<br>FEDERAL WAY WA 98063        | -----                                                                                                                          | 509(A)(1)<br>PUBLIC<br>CHARITY                 | PROGRAM SUPPORT<br>TEACHER RESOURCE CENTER                   | Person or <input type="checkbox"/><br>Business <input checked="" type="checkbox"/><br>10,000. |
| YMCA OF PIERCE AND KITSAP COUNTIES<br>4717 SOUTH 19TH STREET<br>TACOMA WA 98405   | -----                                                                                                                          | 509(A)(1)<br>PUBLIC<br>CHARITY                 | SCHOLARSHIP SUPPORT                                          | Person or <input type="checkbox"/><br>Business <input checked="" type="checkbox"/><br>7,500.  |

Total

533,981.

Form 990-PF, Page 1, Part I  
Line 16b - Accounting Fees

| Name of<br>Provider | Type of Service<br>Provided | Amount<br>Paid<br>Per Books | Net<br>Investment<br>Income | Adjusted<br>Net<br>Income | Disbursements<br>for Charitable<br>Purposes |
|---------------------|-----------------------------|-----------------------------|-----------------------------|---------------------------|---------------------------------------------|
| SAMUEL GALLIMORE    | ACCOUNTING                  | 1,233.                      | 308.                        |                           | 925.                                        |
| K.R. BELL           | ACCOUNTING                  | 6,475.                      | 1,619.                      |                           | 4,856.                                      |

Form 990-PF, Page 1, Part I

Continued

**Line 16b - Accounting Fees**

| Name of Provider | Type of Service Provided | Amount Paid Per Books | Net Investment Income | Adjusted Net Income | Disbursements for Charitable Purposes |
|------------------|--------------------------|-----------------------|-----------------------|---------------------|---------------------------------------|
| Total            |                          | <u>7,708.</u>         | <u>1,927.</u>         |                     | <u>5,781.</u>                         |

Form 990-PF, Page 1, Part I

**Line 16c - Other Professional Fees**

| Name of Provider | Type of Service Provided | Amount Paid Per Books | Net Investment Income | Adjusted Net Income | Disbursements for Charitable Purposes |
|------------------|--------------------------|-----------------------|-----------------------|---------------------|---------------------------------------|
| LAIRD NORTON     | INVESTMENT ADVISOR       | 8,225.                | 8,225.                |                     |                                       |
| Total            |                          | <u>8,225.</u>         | <u>8,225.</u>         |                     |                                       |

Form 990-PF, Page 2, Part II, Line 13

**L-13 Stmt**

| Line 13 - Investments - Other:                 | End of Year       |                   |
|------------------------------------------------|-------------------|-------------------|
|                                                | Book Value        | Fair Market Value |
| BLACKROCK STRATEGIC INCOME FUND                | 280,300.          | 285,625.          |
| DRIEHAUS ACTIVE INCOME FUND                    | 225,340.          | 225,554.          |
| PIMCO FLOATING INCOME FUND                     | 59,200.           | 57,057.           |
| METROPOLITAN WEST TOTAL                        | 541,430.          | 539,948.          |
| RIDGEWORTH SEIX FLOATING RATE HIGH INCOME FUND | 131,300.          | 129,271.          |
| WILLIAM BLAIR BOND FUND - CLASS I              | 185,248.          | 184,255.          |
| DIAMOND HILL LARGE-CAP FUND                    | 423,667.          | 627,704.          |
| VANGUARD GROWTH INDEX FUND                     | 328,852.          | 566,065.          |
| VANGUARD LARGE CAP INDEX FUND                  | 1,063,509.        | 1,578,198.        |
| VANGUARD TOTAL STOCK MARKET INDEX FUND         | 172,366.          | 340,467.          |
| BUFFALO SMALL-CAP FUND                         | 101,768.          | 126,265.          |
| ISHARES RUSSELL 2000 GROWTH                    | 17,833.           | 23,158.           |
| LONGLEAF PARTNERS SMALL-CAP FUND               | 121,906.          | 140,168.          |
| WISDOM TREE INTERNATIONAL SMALL-CAP DIVIDEND   | 55,704.           | 70,776.           |
| DRIEHAUS INTERNATIONAL SMALL-CAP GROWTH FUND   | 69,183.           | 79,923.           |
| HARBOR INTERNATIONAL FUND                      | 570,443.          | 717,762.          |
| SCOUT INTERNATIONAL FUND                       | 593,283.          | 729,192.          |
| ABERDEEN EMERGING MARKETS FUND                 | 110,306.          | 125,328.          |
| PARAMETRIC TAX-MANAGED EMERGING MARKETS FUND   | 330,793.          | 387,349.          |
| WILLIAM BLAIR EMERGING MARKETS GROWTH FUND     | 103,594.          | 128,428.          |
| NORTHERN GLOBAL REAL ESTATE INDEX FUND         | 142,000.          | 144,849.          |
| PIMCO COMMODITY REAL RETURN STRATEGY FUND      | 41,563.           | 35,072.           |
| TORTOISE SELECT OPPORTUNITY INSTITUTIONAL      | 112,000.          | 94,521.           |
| TORTOISE MLP & PIPELINE INSTITUTIONAL          | 56,000.           | 53,159.           |
| Total                                          | <u>5,837,588.</u> | <u>7,390,094.</u> |

**Supporting Statement of:**

Form 990-PF, pl/Line 1(a)

| Description                                                  | Amount            |
|--------------------------------------------------------------|-------------------|
| 2009 BAMFORD 20 YEAR CLAT<br>PO BOX 2274<br>TACOMA, WA 98401 | 1,300,000.        |
| 2011 BAMFORD 20 YEAR CLAT<br>PO BOX 2274<br>TACOMA, WA 98401 | 360,000.          |
| Total                                                        | <u>1,660,000.</u> |

**Supporting Statement of:**

Form 990-PF, pl/Line 13(b)

| Description                | Amount        |
|----------------------------|---------------|
| 15% OF TIME ON INVESTMENTS | 4,766.        |
| Total                      | <u>4,766.</u> |

**Supporting Statement of:**

Form 990-PF, p12/Line 4 Column (d)

| Description                      | Amount          |
|----------------------------------|-----------------|
| DIVIDENDS                        | 121,797.        |
| HERON CAPITAL GAIN DISTRIBUTION  | 9,104.          |
| AGATE CAPITAL GAIN DISTRIBUTION  | 43,293.         |
| LEGACY CAPITAL GAIN DISTRIBUTION | 18,919.         |
| Total                            | <u>193,113.</u> |

**Supporting Statement of:**

Legal and Professional Fees/Line 16b Net invest inc-1

| Description                                        | Amount      |
|----------------------------------------------------|-------------|
| 25% OF TIME SPENT REPORTING/MONITORING INVESTMENTS | 308.        |
| Total                                              | <u>308.</u> |

**Supporting Statement of:**

Legal and Professional Fees/Line 16b Net invest inc-2

| Description                                        | Amount |
|----------------------------------------------------|--------|
| 25% OF TIME SPENT REPORTING/MONITORING INVESTMENTS | 1,619. |
| Total                                              | 1,619. |