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

Department of the Treasury  
Internal Revenue Service

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

Open to Public Inspection

For calendar year 2013 or tax year beginning 12/1/2013, and ending 11/30/2014

Name of foundation <b>C.A BUCK EDUCATION FDN</b>			A Employer identification number <b>94-6100778</b>	
Number and street (or P O box number if mail is not delivered to street address) <b>Wells Fargo Bank N.A. Trust Tax Dept - 1 W 4th St 4th Floor MAC D4000-041</b>		Room/suite	B Telephone number (see instructions) <b>(888) 730-4933</b>	
City or town <b>Winston Salem</b>	State <b>NC</b>	ZIP code <b>27101-3818</b>		
Foreign country name	Foreign province/state/county	Foreign postal code	C If exemption application is pending, check here <input type="checkbox"/>	
G Check all that apply: <input type="checkbox"/> Initial return, <input type="checkbox"/> Initial return of a former public charity, <input type="checkbox"/> Final return, <input type="checkbox"/> Amended return, <input type="checkbox"/> Address change, <input type="checkbox"/> Name change			D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation, <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust, <input type="checkbox"/> Other taxable private foundation			E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ <b>504,775</b>		J Accounting method: <input checked="" type="checkbox"/> Cash, <input type="checkbox"/> Accrual, <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis)		
			F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions) )		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
<b>Revenue</b>	1 Contributions, gifts, grants, etc., received (attach schedule)				
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	12,227	11,832		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	8,095			
	b Gross sales price for all assets on line 6a <b>147,368</b>				
	7 Capital gain net income (from Part IV, line 2)		8,095		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less: Cost of goods sold					
c Gross profit or (loss) (attach schedule)					
11 Other income (attach schedule)					
12 <b>Total. Add lines 1 through 11</b>	20,322	19,927	0		
<b>Operating and Administrative Expenses</b>	13 Compensation of officers, directors, trustees, etc.	8,422	6,316		2,105
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	1,191			1,191
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	655	83		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	10			10
	24 <b>Total operating and administrative expenses. Add lines 13 through 23</b>	10,278	6,399	0	3,306
	25 Contributions, gifts, grants paid	26,233			26,233
26 <b>Total expenses and disbursements. Add lines 24 and 25</b>	36,511	6,399	0	29,539	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	-16,189				
b Net investment income (if negative, enter -0-)		13,528			
c <b>Adjusted net income (if negative, enter -0-)</b>			0		

*Zme*

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions.)			
		Beginning of year	End of year		
		(a) Book Value	(b) Book Value	(c) Fair Market Value	
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	14,720	12,406	12,406
	3	Accounts receivable ▶			
		Less: allowance for doubtful accounts ▶			
	4	Pledges receivable ▶			
		Less: allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶			
		Less: allowance for doubtful accounts ▶			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)			
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment, basis ▶			
	Less: accumulated depreciation (attach schedule) ▶				
12	Investments—mortgage loans				
13	Investments—other (attach schedule)	412,552	402,657	492,369	
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)	427,272	415,063	504,775	
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶)			
	23	<b>Total liabilities</b> (add lines 17 through 22)	0	0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. <input type="checkbox"/>				
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. <input checked="" type="checkbox"/>				
	27	Capital stock, trust principal, or current funds	427,272	415,063	
	28	Paid-in or capital surplus, or land, bldg., and equipment fund			
29	Retained earnings, accumulated income, endowment, or other funds				
30	<b>Total net assets or fund balances</b> (see instructions)	427,272	415,063		
31	<b>Total liabilities and net assets/fund balances</b> (see instructions)	427,272	415,063		

**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	427,272
2	Enter amount from Part I, line 27a	2	-16,189
3	Other increases not included in line 2 (itemize) ▶ See Attached Statement	3	5,430
4	Add lines 1, 2, and 3	4	416,513
5	Decreases not included in line 2 (itemize) ▶ See Attached Statement	5	1,450
6	<b>Total net assets or fund balances at end of year</b> (line 4 minus line 5)—Part II, column (b), line 30	6	415,063

**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a See Attached Statement				
b See Attached Statement				
c See Attached Statement				
d See Attached Statement				
e See Attached Statement				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a			0	
b			0	
c			0	
d			0	
e			0	
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))	
a			0	
b			0	
c			0	
d			0	
e			0	
2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }		2	8,095	
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8 }		3	0	

**Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income**

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?  Yes  No  
If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part

1 Enter the appropriate amount in each column for each year; see the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2012	23,854	489,995	0.048682
2011	22,510	466,059	0.048299
2010	17,889	478,537	0.037383
2009	16,814	444,900	0.037793
2008	20,874	383,960	0.054365
2 Total of line 1, column (d)			0.226522
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years			0.045304
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5			511,821
5 Multiply line 4 by line 3			23,188
6 Enter 1% of net investment income (1% of Part I, line 27b)			135
7 Add lines 5 and 6			23,323
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions.			29,539

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

<b>1a</b>	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)			
<b>b</b>	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	<b>1</b>	135	
<b>c</b>	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b).			
<b>2</b>	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	<b>2</b>	0	
<b>3</b>	Add lines 1 and 2	<b>3</b>	135	
<b>4</b>	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	<b>4</b>		
<b>5</b>	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	<b>5</b>	135	
<b>6</b>	Credits/Payments.			
<b>a</b>	2013 estimated tax payments and 2012 overpayment credited to 2013	<b>6a</b>	350	
<b>b</b>	Exempt foreign organizations—tax withheld at source	<b>6b</b>		
<b>c</b>	Tax paid with application for extension of time to file (Form 8868)	<b>6c</b>		
<b>d</b>	Backup withholding erroneously withheld	<b>6d</b>		
<b>7</b>	Total credits and payments. Add lines 6a through 6d	<b>7</b>	350	
<b>8</b>	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	<b>8</b>		
<b>9</b>	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	<b>9</b>	0	
<b>10</b>	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	<b>10</b>	215	
<b>11</b>	Enter the amount of line 10 to be: Credited to 2014 estimated tax <b>135</b> Refunded	<b>11</b>	80	

**Part VII-A Statements Regarding Activities**

	Yes	No
<b>1a</b>		X
<b>b</b>		X
<b>c</b>		X
<b>d</b>		
<b>e</b>		
<b>2</b>		X
<b>3</b>		X
<b>4a</b>		X
<b>4b</b>	N/A	
<b>5</b>		X
<b>6</b>	X	
<b>7</b>	X	
<b>8a</b>		
<b>8b</b>	X	
<b>9</b>		X
<b>10</b>		X

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

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ N/A	13	X	
14	The books are in care of ▶ WELLS FARGO BANK N.A Telephone no ▶ 888-730-4933 Located at ▶ 1 W 4th St 4th Floor MAC D4000-041 Winston Salem NC ZIP+4 ▶ 27101-3818			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041—Check here and enter the amount of tax-exempt interest received or accrued during the year ▶ 15 N/A			
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes," enter the name of the foreign country ▶	16	Yes	No
				X

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

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

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

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

**5a** During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?  Yes  No

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

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

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

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

**b** If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)? **5b**  Yes  No

Organizations relying on a current notice regarding disaster assistance check here

**c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?  Yes  No **6b**  Yes  No

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

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

**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  Yes  No **7b**  Yes  No

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

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

**b** If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?  Yes  No

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

**1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).**

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (if not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Wells Fargo Bank N A Trust Tax Dept 1 W 4th St 4th Floor MAC D4000-041 Winston Salem, I	Trustee 4.00	8,422		

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

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

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

**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**

**3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE."**

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

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

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

Expenses

1 NONE	
2	
3	
4	

**Part IX-B Summary of Program-Related Investments (see instructions)**

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2

Amount

1 NONE		
2		
All other program-related investments See instructions		
3 NONE		
<b>Total. Add lines 1 through 3</b>		▶ 0



**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>1a</b>	497,270
<b>b</b>	Average of monthly cash balances	<b>1b</b>	22,345
<b>c</b>	Fair market value of all other assets (see instructions)	<b>1c</b>	
<b>d</b>	<b>Total</b> (add lines 1a, b, and c)	<b>1d</b>	519,615
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</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>	519,615
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see instructions)	<b>4</b>	7,794
<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>	511,821
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5	<b>6</b>	25,591

**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>	25,591
<b>2a</b>	Tax on investment income for 2013 from Part VI, line 5	<b>2a</b>	135
<b>b</b>	Income tax for 2013 (This does not include the tax from Part VI)	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b	<b>2c</b>	135
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1	<b>3</b>	25,456
<b>4</b>	Recoveries of amounts treated as qualifying distributions	<b>4</b>	3,000
<b>5</b>	Add lines 3 and 4	<b>5</b>	28,456
<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>	28,456

**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>1a</b>	29,539
<b>b</b>	Program-related investments—total from Part IX-B	<b>1b</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>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule)	<b>3b</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>	29,539
<b>5</b>	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions)	<b>5</b>	135
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	<b>6</b>	29,404

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

**Part XIII Undistributed Income (see instructions)**

	(a) Corpus	(b) Years prior to 2012	(c) 2012	(d) 2013
1 Distributable amount for 2013 from Part XI, line 7				28,456
2 Undistributed income, if any, as of the end of 2013.				
a Enter amount for 2012 only			4,396	
b Total for prior years: 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2013				
a From 2008				
b From 2009				
c From 2010				
d From 2011				
e From 2012				
f Total of lines 3a through e	0			
4 Qualifying distributions for 2013 from Part XII, line 4. ▶ \$ 29,539				
a Applied to 2012, but not more than line 2a			4,396	
b Applied to undistributed income of prior years (Election required—see instructions)				
c Treated as distributions out of corpus (Election required—see instructions)				
d Applied to 2013 distributable amount				25,143
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2013. (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e Subtract line 5	0			
b Prior years' undistributed income Subtract line 4b from line 2b		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b. Taxable amount—see instructions				
e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014				3,313
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)				
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions)				
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9.				
a Excess from 2009				
b Excess from 2010				
c Excess from 2011				
d Excess from 2012				
e Excess from 2013				

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

- 1a** If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2013, enter the date of the ruling ▶
- b** Check box to indicate whether the foundation is a private operating foundation described in section  4942(j)(3) or  4942(j)(5)

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

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

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

NONE

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

NONE

- 2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**
- Check here  if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

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

MARTIN JERRY MAGINI 316 BURLINGAME AVE BURLINGAME, CA 94010 (650) 344-3426

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

**COMPLETED APPLICATION (SEE ATTACHED), TRANSCRIPTS, AND PROOF OF ENROLLMENT**

- c** Any submission deadlines:

NONE

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

**CANDIDATES MUST BE A RESIDENT OF SAN MATEO COUNTY**

**Part XV** Supplementary Information (continued)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i> See Attached Statement				
<b>Total</b>			▶ <b>3a</b>	<b>26,233</b>
b <i>Approved for future payment</i> NONE				
<b>Total</b>			▶ <b>3b</b>	<b>0</b>





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

Recipient(s) paid during the year

**Name**

SAN FRANCISCO STATE UNIVERSITY

**Street**

1600 HOLLOWAY AVE

**City**

SAN FRANCISCO

**State**

CA

**Zip Code**

94132

**Foreign Country****Relationship**

NONE

**Foundation Status**

PC

**Purpose of grant/contribution**

SCHOLARSHIP

**Amount**

1,233

**Name**

CALIFORNIA STATE UNIVERSITY SACRAMENTO

**Street**

6000 J STREET

**City**

SACRAMENTO

**State**

CA

**Zip Code**

95819

**Foreign Country****Relationship**

NONE

**Foundation Status**

PC

**Purpose of grant/contribution**

SCHOLARSHIP

**Amount**

5,000

**Name**

SAN JOSE STATE UNIVERSITY

**Street**

ONE WASHINGTON SQUARE

**City**

SAN JOSE

**State**

CA

**Zip Code**

95192

**Foreign Country****Relationship**

NONE

**Foundation Status**

PC

**Purpose of grant/contribution**

SCHOLARSHIP

**Amount**

3,200

**Name**

XAVIER UNIVERSITY OF LOUISIANA

**Street**

ONE DREXEL DRIVE

**City**

NEW ORLEANS

**State**

LA

**Zip Code**

70125

**Foreign Country****Relationship**

NONE

**Foundation Status**

PC

**Purpose of grant/contribution**

SCHOLARSHIP

**Amount**

4,500

**Name**

UC SANTA CRUZ

**Street**

1156 HIGH STREET

**City**

SANTA CRUZ

**State**

CA

**Zip Code**

95064

**Foreign Country****Relationship**

NONE

**Foundation Status**

PC

**Purpose of grant/contribution**

SCHOLARSHIP

**Amount**

4,500

**Name**

PEPPERDINE UNIVERSITY

**Street**

24255 PACIFIC COAST HIGHWAY

**City**

MALIBU

**State**

CA

**Zip Code**

90263

**Foreign Country****Relationship**

NONE

**Foundation Status**

PC

**Purpose of grant/contribution**

SCHOLARSHIP

**Amount**

2,800

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

Recipient(s) paid during the year

Name

VASSAR COLLEGE

Street

124 RAYMOND AVENUE

City

POUGHKEEPSIE

State

NY

Zip Code

12604

Foreign Country

Relationship

NONE

Foundation Status

PC

Purpose of grant/contribution

SCHOLARSHIP

Amount

5,000

Name

Street

City

State

Zip Code

Foreign Country

Relationship

Foundation Status

Purpose of grant/contribution

Amount

Name

Street

City

State

Zip Code

Foreign Country

Relationship

Foundation Status

Purpose of grant/contribution

Amount

Name

Street

City

State

Zip Code

Foreign Country

Relationship

Foundation Status

Purpose of grant/contribution

Amount

Name

Street

City

State

Zip Code

Foreign Country

Relationship

Foundation Status

Purpose of grant/contribution

Amount

Name

Street

City

State

Zip Code

Foreign Country

Relationship

Foundation Status

Purpose of grant/contribution

Amount



Security Type	EIN	CUSIP	Asset Name	Units	Fed Cost	FMV
Savings & Temp Inv	94-6100778	99999Y944	SECURED MARKET DEPOSIT ACCOUNT	7,554.16	7,554	7,554
Savings & Temp Inv	94-6100778	99999Y944	SECURED MARKET DEPOSIT ACCOUNT	4,851.73	4,852	4,852
<b>Savings &amp; Temp Inv Total</b>					<b>12,406</b>	<b>12,406</b>
Invest - Other	94-6100778	693390882	PIMCO FOREIGN BD FD USD H-INST #103	349.15	3,707	3,945
Invest - Other	94-6100778	77957P105	T ROWE PRICE SHORT TERM BD FD #55	1,500.24	7,186	7,171
Invest - Other	94-6100778	74255L696	PRINCIPAL GL MULT STRAT-INST #4684	461.16	5,091	5,202
Invest - Other	94-6100778	81369Y308	CONSUMER STAPLES SECTOR SPDR TR	115.00	3,088	5,670
Invest - Other	94-6100778	81369Y605	FINANCIAL SELECT SECTOR SPDR	390.00	5,634	9,516
Invest - Other	94-6100778	81369Y100	AMEX MATERIALS SPDR	34.00	1,059	1,671
Invest - Other	94-6100778	81369Y803	AMEX TECHNOLOGY SELECT SPDR	272.00	5,942	11,557
Invest - Other	94-6100778	81369Y506	AMEX ENERGY SELECT SPDR	58.00	3,084	4,630
Invest - Other	94-6100778	999708902	TAXABLE INTERMEDIATE TERM BD FD	1,736.14	17,113	17,657
Invest - Other	94-6100778	589509207	MERGER FUND-INST #301	464.38	7,301	7,518
Invest - Other	94-6100778	315920702	FID ADV EMER MKTS INC- CL I #607	541.65	7,410	7,486
Invest - Other	94-6100778	464287804	ISHARES CORE S&P SMALL-CAP E	259.00	17,760	28,827
Invest - Other	94-6100778	464287705	ISHARES S&P MID-CAP 400 VALUE	166.00	13,379	21,052
Invest - Other	94-6100778	464287606	ISHARES S&P MID-CAP 400 GROWTH	131.00	11,194	20,965
Invest - Other	94-6100778	81369Y704	AMEX INDUSTRIAL SPDR	119.00	3,682	6,772
Invest - Other	94-6100778	81369Y209	AMEX HEALTH CARE SPDR	106.00	3,033	7,379
Invest - Other	94-6100778	81369Y407	AMEX CONSUMER DISCR SPDR	105.00	3,228	7,540
Invest - Other	94-6100778	140995127	CORE EQUITY FUND	1,878.65	23,676	29,645
Invest - Other	94-6100778	261980494	DREYFUS EMG MKT DEBT LOC C-I #6083	902.27	12,854	12,045
Invest - Other	94-6100778	262028855	DRIEHAUS ACTIVE INCOME FUND	958.49	10,280	10,102
Invest - Other	94-6100778	67065Q772	NUVEEN HIGH YIELD MUNI BD-R #1668	511.84	8,410	8,778
Invest - Other	94-6100778	63872T885	ASG GLOBAL ALTERNATIVES-Y #1993	1,352.46	15,537	15,716
Invest - Other	94-6100778	94985D582	WELLS FARGO ADV INTL BOND-IS #4705	343.35	3,839	3,708
Invest - Other	94-6100778	922908553	VANGUARD REIT VIPER	270.00	8,728	21,754
Invest - Other	94-6100778	00203H859	AQR MANAGED FUTURES STR-I #15213	723.66	7,385	8,156
Invest - Other	94-6100778	922042858	VANGUARD FTSE EMERGING MARKETS ETF	1,157.00	42,422	48,791
Invest - Other	94-6100778	77958B402	T ROWE PRICE INST FLOAT RATE #170	799.30	8,222	8,113
Invest - Other	94-6100778	921937835	VANGUARD TOTAL BOND MARKET ETF	204.00	16,730	16,905
Invest - Other	94-6100778	78463X863	SPDR DJ WILSHIRE INTERNATIONAL REAL	465.00	17,069	19,976
Invest - Other	94-6100778	921943858	VANGUARD FTSE DEVELOPED ETF	1,480.00	54,195	58,623
Invest - Other	94-6100778	74925K581	ROBECO BP LNG/SHRT RES-INS	509.49	6,786	7,811
Invest - Other	94-6100778	25264S833	DIAMOND HILL LONG-SHORT FD CL I #11	427.81	7,017	10,254
Invest - Other	94-6100778	949917538	WELLS FARGO ADV HI INC-INS #3110	1,155.92	7,740	8,357
Invest - Other	94-6100778	64128R608	NEUBERGER BERMAN LONG SH-INS #1830	779.09	9,988	10,253
Invest - Other	94-6100778	22544R305	CREDIT SUISSE COMM RET ST-I #2156	2,900.45	22,886	18,824
<b>Invest - Other Total</b>					<b>402,657</b>	<b>492,369</b>
<b>Grand Total</b>					<b>415,063</b>	<b>504,775</b>

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

Check "X" to include in Part IV	Description	CUSIP #	Purchaser	Check "X" if Purchaser is a Business	Date Acquired	Acquisition Method	Date Sold	Totals		Valuation Method	Expense of Sale and Cost of Improvements	Depreciation	Adjustments	Net Gain or Loss
								Capital Gains/Losses	Other Sales					
								Gross Sales	147,368	Cost Other Basis and Expenses		198,273	0	9,095
1	CORE EQUITY FUND	140995127			7/22/2010		1/22/2014	Gross Sales Price	1,148	877			0	272
2	CREDIT SUISSE COMM RET S	22544R305			1/23/2010		4/22/2014		1,654	1,895			0	-241
3	CREDIT SUISSE COMM RET S	22544R305			1/23/2010		7/31/2014		5,873	7,175			0	-1,302
4	CREDIT SUISSE COMM RET S	22544R305			1/23/2010		1/14/2014		500	871			0	-171
5	DIAMOND HILL LONG-SHORT	25264S833			8/17/2012		1/22/2014		612	485			0	127
6	DIAMOND HILL LONG-SHORT	25264S833			8/17/2012		1/14/2014		400	308			0	94
7	DREYFUS EMG MKT DEBT LC	261980494			2/9/2011		7/31/2014		5,487	5,513			0	-46
8	DREYFUS EMG MKT DEBT LC	261980494			2/9/2011		1/14/2014		100	107			0	-7
9	DRIEHAUS ACTIVE INCOME F	282028655			7/17/2013		1/22/2014		2,713	2,683			0	20
10	DRIEHAUS ACTIVE INCOME F	282028655			7/17/2013		7/31/2014		1,940	1,942			0	-2
11	DRIEHAUS ACTIVE INCOME F	282028655			10/17/2013		1/14/2014		300	305			0	-5
12	FID ADV EMER MKTS INC-CL	315920702			10/17/2013		1/14/2014		200	196			0	4
13	ISHARES S&P MID-CAP 400 G	464287608			8/15/2012		1/22/2014		1,060	783			0	287
14	ISHARES S&P MID-CAP 400 G	464287608			8/15/2012		4/22/2014		150	109			0	41
15	ISHARES S&P MID-CAP 400 G	464287608			7/17/2013		1/22/2014		1,354	1,107			0	247
16	ISHARES S&P MID-CAP 400 G	464287608			8/15/2011		4/22/2014		1,505	885			0	520
17	ISHARES S&P MID-CAP 400 G	464287608			7/22/2010		1/14/2014		1,566	1,825			0	-31
18	ISHARES S&P MID-CAP 400 V	464287705			7/31/2014		1/22/2014		589	337			0	252
19	ISHARES S&P MID-CAP 400 V	464287705			7/31/2014		1/22/2014		1,245	1,222			0	23
20	ISHARES CORE S&P SMALL-C	464287804			2/7/2011		1/22/2014		1,531	880			0	541
21	ISHARES CORE S&P SMALL-C	464287804			4/22/2014		1/14/2014		775	752			0	23
22	ISHARES CORE S&P SMALL-C	464287804			7/31/2014		1/14/2014		775	752			0	23
23	ISHARES CORE S&P SMALL-C	464287804			2/7/2011		1/14/2014		111	71			0	40
24	MERGER FD SH BEN INT #26	589509108			2/17/2013		7/31/2014		2,282	2,175			0	87
25	MERGER FUND-INST #301	589509207			2/17/2013		1/14/2014		300	284			0	6
26	ASG GLOBAL ALTERNATIVES	638721865			10/17/2013		1/22/2014		228	231			0	-3
27	ASG GLOBAL ALTERNATIVES	638721865			10/17/2013		1/22/2014		1,920	1,937			0	-17
28	ASG GLOBAL ALTERNATIVES	638721865			7/17/2013		7/31/2014		2,683	2,780			0	-97
29	ASG GLOBAL ALTERNATIVES	638721865			7/17/2013		1/14/2014		600	618			0	-18
30	CORE EQUITY FUND	140995127			2/7/2011		1/22/2014		131	122			0	9
31	NEUBERGER BERMAN LONG	84128R608			4/24/2014		1/14/2014		600	594			0	6
32	NEUBERGER BERMAN LONG	84128R608			4/24/2014		1/14/2014		600	594			0	6
33	PIMCO TOTAL RET FD-INST #1	670650772			8/4/2014		9/5/2014		2,499	2,484			0	12
34	PIMCO TOTAL RET FD-INST #	693390700			8/4/2014		9/30/2014		2,499	2,484			0	12
35	PIMCO FOREIGN BD FD USD	693390882			8/17/2011		1/14/2014		17,501	17,613			0	-112
36	PRINCIPAL GL MULT STRAT I	742551696			8/4/2014		1/14/2014		100	95			0	5
37	ROBECO BP LINGSHIRT RES	74825K581			7/17/2013		1/22/2014		200	199			0	1
38	ROBECO BP LINGSHIRT RES	74825K581			7/17/2013		1/22/2014		3,441	3,170			0	271
39	SPDR DJ WILSHIRE INTERNA	78463K963			5/2/2011		7/31/2014		5,148	4,609			0	539
40	SPDR DJ WILSHIRE INTERNA	78463K963			5/2/2011		7/31/2014		974	915			0	59
41	AMEX MATERIALS SPDR	81369Y100			2/7/2013		1/14/2014		428	426			0	3
42	AMEX MATERIALS SPDR	81369Y100			2/7/2013		1/14/2014		95	78			0	18
43	AMEX HEALTH CARE SPDR	81369Y209			7/22/2010		1/14/2014		142	93			0	49
44	CONSUMER STAPLES SECTO	81369Y308			7/22/2010		1/14/2014		338	143			0	193
45	AMEX CONSUMER DISCR SPC	81369Y407			7/22/2010		1/14/2014		706	403			0	303
46	FINANCIAL SELECT SECTOR	81369Y605			7/22/2010		1/14/2014		335	154			0	181
47	AMEX INDUSTRIAL SPDR	81369Y704			10/15/2013		1/14/2014		367	305			0	52
48	AMEX INDUSTRIAL SPDR	81369Y704			7/22/2010		1/22/2014		624	350			0	274
49	AMEX TECHNOLOGY SELECT	81369Y803			7/31/2014		1/14/2014		551	525			0	26
50	VANGUARD TOTAL BOND MA	921937835			9/30/2014		1/22/2014		681	415			0	268
51	ROBECO BP LINGSHIRT RES	74825K581			8/4/2014		1/14/2014		411	410			0	1
52	T ROWE PRICE SHORT TERM	77957P105			7/17/2013		1/14/2014		268	300			0	-34
53	VANGUARD FTSE DEVELOPE	922042858			7/22/2008		4/22/2014		300	301			0	-1
54	VANGUARD FTSE EMERGING	922042858			2/7/2013		4/22/2014		618	670			0	-57
55	VANGUARD FTSE EMERGING	922042858			2/7/2013		4/22/2014		577	616			0	-32
56	VANGUARD FTSE EMERGING	922042858			8/15/2011		7/31/2014		865	867			0	-2
57	VANGUARD FTSE EMERGING	922042858			8/15/2011		1/14/2014		1,886	1,858			0	28
58	VANGUARD FTSE EMERGING	922042858			10/15/2013		1/14/2014		2,113	2,160			0	-47
59	VANGUARD REIT VIPER	922808553			8/7/2009		1/14/2014		78	67			0	12
60	VANGUARD REIT VIPER	922808553			8/7/2009		1/14/2014		1,507	680			0	817
61	WELLS FARGO ADV INTL BON	948917538			2/9/2011		1/14/2014		100	108			0	-8
62	WELLS FARGO ADV HI INC-IN	948917538			7/17/2013		1/22/2014		4,732	4,884			0	-152
63	WELLS FARGO ADV HI INC-IN	948917538			7/24/2008		1/22/2014		5,137	4,816			0	321
64	WELLS FARGO ADV HI INC-IN	948917538			2/17/2012		4/22/2014		663	660			0	3
65	WELLS FARGO ADV HI INC-IN	948917538			7/17/2013		4/22/2014		4,003	4,072			0	-69
66	WELLS FARGO ADV HI INC-IN	948917538			10/17/2013		4/22/2014		942	668			0	-28
67	WELLS FARGO ADV HI INC-IN	948917538			10/17/2013		4/22/2014		828	640			0	-12
68	WELLS FARGO ADV HI INC-IN	948917538			8/11/2009		4/22/2014		217	185			0	22



**Part I, Line 16b (990-PF) - Accounting Fees**

		1,191	0	0	1,191
Description		Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes (Cash Basis Only)
1	TAX PREP FEES	1,191			1,191

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

		655	83	0	0
Description		Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
1	Foreign Tax Withheld	83	83		
2	PY Excise Tax Due	222			
3	Estimated Excise Payments	350			

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

		10	0	0	10
Description		Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
1	State AG Fees	10			10

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

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

1	Undistributed CTF Capital Gain	1	2,430
2	Recovery of Grants Paid	2	3,000
3	Total	3	5,430

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

1	Cost Basis Adjustment	1	926
2	Mutual Fund Timing Difference	2	20
3	CTF Income Timing Difference	3	17
4	CTF Book to Tax Difference	4	245
5	PY Return of Capital Adjustment	5	242
6	Total	6	1,450

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

	Date		Amount
1 Credit from prior year return . . . . .		1	0
2 First quarter estimated tax payment . . . . .	4/10/2014	2	350
3 Second quarter estimated tax payment . . . . .		3	
4 Third quarter estimated tax payment . . . . .		4	
5 Fourth quarter estimated tax payment . . . . .		5	
6 Other payments . . . . .		6	
7 Total . . . . .		7	350

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

Line	Name	Check "X" if Business	Street	City	State	Zip Code	Foreign Country	Title	Avg Hrs Per Week	Compensation	Benefits	Expense Account
1	Wells Fargo Bank N.A. Trust Tax D	X	1 W 4th St 4th Floor MAC D4000-041	Winston Salem	NC	27101-3818		Trustee	4 00	8,422	8,422	0

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

1	Distributable amounts for 2012 that remained undistributed at the beginning of the 2013 tax year	1	4,396
2		2	
3		3	
4		4	
5		5	
6		6	
7		7	
8		8	
9		9	
10	Total	10	4,396

**APPLICATION FOR C.A. BUCK EDUCATIONAL FOUNDATION SCHOLARSHIP**

FOR THE SCHOOL YEAR 20\_\_ - \_\_

(Check one: Original \_\_\_\_ 2<sup>nd</sup> \_\_\_\_ 3<sup>rd</sup> \_\_\_\_ 4<sup>th</sup> \_\_\_\_ 5<sup>th</sup> \_\_\_\_)

Name of applicant \_\_\_\_\_ SS#: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Home address: \_\_\_\_\_  
(street) (City) (State) (Zip)

Home Phone \_\_\_\_\_ Date of Birth \_\_\_\_\_ Age: \_\_\_\_\_

High school or college last attended \_\_\_\_\_  
(School Name) (City)

Date of high school graduation \_\_\_\_\_

Additional training or education (military, special classes, schools, etc.) \_\_\_\_\_

College or university you will attend \_\_\_\_\_

1<sup>st</sup> choice: \_\_\_\_\_ 2<sup>nd</sup> choice: \_\_\_\_\_ 3<sup>rd</sup> choice: \_\_\_\_\_

What is your planned future vocation? (Be specific.) \_\_\_\_\_

Where will you live while attending school? Home \_\_\_\_\_ Dormitory \_\_\_\_\_ Rent \_\_\_\_\_ Other \_\_\_\_\_

Family Information List parents and all persons supported by your parents. Include your spouse if married

<u>Name</u>	<u>Age</u>	<u>Occupation or Grade in School</u>	<u>Gross Annual Income</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
Spouse _____	_____	_____	_____

- List the school activities in which you have participated
1. \_\_\_\_\_
  2. \_\_\_\_\_
  3. \_\_\_\_\_
  4. \_\_\_\_\_
  5. \_\_\_\_\_
  6. \_\_\_\_\_

- List the community, church or other activities in which you have participated
1. \_\_\_\_\_
  2. \_\_\_\_\_
  3. \_\_\_\_\_
  4. \_\_\_\_\_
  5. \_\_\_\_\_

**Financial Status**

Assets of Parent (s) or Guardian

Cash in bank \_\_\_\_\_  
 Stocks, bonds, trusts, etc. \_\_\_\_\_  
 Automobile (s) \_\_\_\_\_  
 Equity in home \_\_\_\_\_  
 Other assets: itemize \_\_\_\_\_

**Total assets:** 1. \_\_\_\_\_

Liabilities of Parent (s) or Guardian

Charge accounts \_\_\_\_\_  
 Automobile loan \_\_\_\_\_  
 Home mortgage \_\_\_\_\_  
 Other money owed: itemize \_\_\_\_\_

**Total Liabilities:** 2. \_\_\_\_\_

NET WORTH (1 minus 2) \_\_\_\_\_

Assets of Applicant

Cash in bank \_\_\_\_\_  
 Stocks, bonds, trusts, etc \_\_\_\_\_  
 Automobile \_\_\_\_\_  
 Other assets: itemize \_\_\_\_\_

**Total Assets:** 1. \_\_\_\_\_

Liabilities of Applicant

Charge accounts \_\_\_\_\_  
 Automobile loan \_\_\_\_\_  
 Other money owed: itemize \_\_\_\_\_

**Total Liabilities:** 2. \_\_\_\_\_

NET WORTH (1 minus 2) \_\_\_\_\_

**Income and Expenses of Applicant for the Next School Year**

<u>Income</u>		<u>Expenses</u>	<u>Amount</u>
Parental support	_____	Tuition	_____
Work (at school)	_____	Room and board	_____
Work (summer)	_____	Books, lab fees, etc	_____
Trusts, grandparents, etc.	_____	Transportation	_____
Scholarships received.	_____	Other expenses: itemize	_____
_____	_____	_____	_____
_____	_____	_____	_____
Educational loan (s)	_____	<b>Total Expenses:</b>	4 _____
<b>Total income:</b>	3. _____		

NET AMOUNT NEEDED FROM SEPTEMBER 20\_\_\_\_ TO JUNE 20\_\_\_\_ (4 minus 3)

Use space below, if needed, to explain any of the above items

What do you intend to do this coming summer? (approximately 50 words)

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References (one counselor, one teacher, and two outside of school non- relatives).

These letters are to be confidential and sent directly to the C A Buck Educational Foundation, 316 Burlingame Ave., Burlingame, CA 94010 by the person writing the reference

	<u>Name</u>	<u>Address</u>	<u>Telephone</u>
1.	_____	_____	_____
	(Counselor)		
2.	_____	_____	_____
	(Teacher)		
3.	_____	_____	_____
	(Person outside of school)		
4.	_____	_____	_____
	(Person outside of school)		

In your own handwriting please state why you are applying for a grant from this foundation and how you are planning to use the education you obtain (approximately 200 words) Write your essay on the back page (4).