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Form 990-PF

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 instructions is at www.irs.gov/form990pf.

2014

Open to Public
Inspection

For calendar year 2014, or tax year beginning 01-01-2014 , and ending 12-31-2014

| | | |
|---|--|---|
| Name of foundation CECILE STEPHENS CHARITABLE FOUNDATION | | A Employer identification number 20-1106340 |
| Number and street (or P O box number if mail is not delivered to street address) PO BOX 903 | | B Telephone number (see instructions) (714) 422-8541 |
| City or town, state or province, country, and ZIP or foreign postal code SEAL BEACH, CA 90740 | | |
| 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 | | C If exemption application is pending, check here ► <input type="checkbox"/> D 1. Foreign organizations, check here ► <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation ► <input type="checkbox"/> E If private foundation status was terminated under section 507(b)(1)(A), check here ► <input type="checkbox"/> F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ► <input type="checkbox"/> |
| H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation | | |
| I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ► \$ 443,601 | 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.) | |

| Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions)) | | (a) Revenue and expenses per books | (b) Net investment income | (c) Adjusted net income | (d) Disbursements for charitable purposes (cash basis only) |
|--|--|------------------------------------|---------------------------|-------------------------|---|
| Revenue | 1 Contributions, gifts, grants, etc , received (attach schedule) | 51,836 | | | |
| | 2 Check ► <input 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. | | | | |
| | 5a Gross rents | | | | |
| | b Net rental income or (loss) _____ | | | | |
| | 6a Net gain or (loss) from sale of assets not on line 10 | | | | |
| | b Gross sales price for all assets on line 6a | | | | |
| | 7 Capital gain net income (from Part IV, line 2) | | 0 | | |
| | 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) | 15,231 | 15,231 | | |
| | 12 Total. Add lines 1 through 11 | 67,067 | 15,231 | | |
| Operating and Administrative Expenses | 13 Compensation of officers, directors, trustees, etc | 60,000 | 0 | 0 | |
| | 14 Other employee salaries and wages | | | | |
| | 15 Pension plans, employee benefits | | | | |
| | 16a Legal fees (attach schedule) | | | | |
| | b Accounting fees (attach schedule) | 3,320 | 0 | 0 | |
| | c Other professional fees (attach schedule) | | | | |
| | 17 Interest | | | | |
| | 18 Taxes (attach schedule) (see instructions) | 229 | 0 | 0 | |
| | 19 Depreciation (attach schedule) and depletion | | | | |
| | 20 Occupancy | | | | |
| | 21 Travel, conferences, and meetings | | | | |
| | 22 Printing and publications | | | | |
| | 23 Other expenses (attach schedule) | 62 | 0 | 0 | |
| | 24 Total operating and administrative expenses. | 63,611 | 0 | 0 | |
| | Add lines 13 through 23 | | | | |
| | 25 Contributions, gifts, grants paid. | 114,077 | | 114,077 | |
| | 26 Total expenses and disbursements. Add lines 24 and 25 | 177,688 | 0 | 0 | 114,077 |
| | 27 Subtract line 26 from line 12 | | | | |
| | a Excess of revenue over expenses and disbursements | -110,621 | | | |
| | b Net investment income (if negative, enter -0-) | | 15,231 | | |
| | c Adjusted net income (if negative, enter -0-) | | | | |

| Part III Balance Sheets | | Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions) | | |
|--|---|---|---|--------|
| | | Beginning of year (a) Book Value | End of year (b) Book Value (c) Fair Market Value | |
| Assets | 1 Cash—non-interest-bearing | 67,816 | 70,964 | 70,964 |
| | 2 Savings and temporary cash investments | | | |
| | 3 Accounts receivable ► | | | |
| | Less allowance for doubtful accounts ► | | | |
| | 4 Pledges receivable ► | | | |
| | Less allowance for doubtful accounts ► | | | |
| | 5 Grants receivable | | | |
| | 6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) | | | |
| | 7 Other notes and loans receivable (attach schedule) ► | | | |
| | Less allowance for doubtful accounts ► | | | |
| | 8 Inventories for sale or use | | | |
| | 9 Prepaid expenses and deferred charges | | | |
| | 10a Investments—U S and state government obligations (attach schedule) | | | |
| | b Investments—corporate stock (attach schedule) | | | |
| | 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) | 487,950 | 374,181 | 372,637 | |
| 14 Land, buildings, and equipment basis ► | | | | |
| Less accumulated depreciation (attach schedule) ► | | | | |
| 15 Other assets (describe ►) | | | | |
| 16 Total assets (to be completed by all filers—see the instructions Also, see page 1, item I) | 555,766 | 445,145 | 443,601 | |
| 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 ►) | 0 | 0 | |
| | 23 Total liabilities (add lines 17 through 22) | 0 | 0 | |
| Net Assets or Fund Balances | Foundations that follow SFAS 117, check here ► <input type="checkbox"/> | | | |
| | and complete lines 24 through 26 and lines 30 and 31. | | | |
| | 24 Unrestricted | | | |
| | 25 Temporarily restricted | | | |
| | 26 Permanently restricted | | | |
| | Foundations that do not follow SFAS 117, check here ► <input checked="" type="checkbox"/> | | | |
| | and complete lines 27 through 31. | | | |
| | 27 Capital stock, trust principal, or current funds | 1,351,943 | 1,351,943 | |
| | 28 Paid-in or capital surplus, or land, bldg , and equipment fund | 0 | 0 | |
| | 29 Retained earnings, accumulated income, endowment, or other funds | -796,177 | -906,798 | |
| | 30 Total net assets or fund balances (see instructions) | 555,766 | 445,145 | |
| 31 Total liabilities and net assets/fund balances (see instructions) | 555,766 | 445,145 | | |

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 | 555,766 |
| 2 | Enter amount from Part I, line 27a | 2 | -110,621 |
| 3 | Other increases not included in line 2 (itemize) ► | 3 | 0 |
| 4 | Add lines 1, 2, and 3 | 4 | 445,145 |
| 5 | Decreases not included in line 2 (itemize) ► | 5 | 0 |
| 6 | Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 | 6 | 445,145 |

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

| | | | |
|--|--|--|--|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

| (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 | | | |
| b | | | |
| c | | | |
| d | | | |
| e | | | |

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

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

| | | | |
|---|---|---|--|
| 2 Capital gain net income or (net capital loss) | If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 | 2 | |
| 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 | |

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 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)) |
|--|--|--|---|
| 2013 | 93,193 | 584,133 | 0 159541 |
| 2012 | 73,237 | 620,634 | 0 118004 |
| 2011 | 54,317 | 650,589 | 0 083489 |
| 2010 | 55,155 | 752,899 | 0 073257 |
| 2009 | 79,893 | 770,783 | 0 103652 |
| 2 Total of line 1, column (d). | | | 2 0 537943 |
| 3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years | | | 3 0 107589 |
| 4 Enter the net value of noncharitable-use assets for 2014 from Part X, line 5. | | | 4 462,825 |
| 5 Multiply line 4 by line 3. | | | 5 49,795 |
| 6 Enter 1% of net investment income (1% of Part I, line 27b). | | | 6 152 |
| 7 Add lines 5 and 6. | | | 7 49,947 |
| 8 Enter qualifying distributions from Part XII, line 4. | | | 8 114,077 |

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)

| | | | |
|---|--|----|-----|
| 1a | Exempt operating foundations described in section 4940(d)(2), check here <input checked="" type="checkbox"/> and enter "N/A" on line 1 | | |
| Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions) | | 1 | 152 |
| 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 | | |
| c | All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col. (b) | | |
| 2 | Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-) | 2 | 0 |
| 3 | Add lines 1 and 2. | 3 | 152 |
| 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 | 152 |
| 6 | Credits/Payments | | |
| a | 2014 estimated tax payments and 2013 overpayment credited to 2014 | 6a | 332 |
| b | Exempt foreign organizations—tax withheld at source | 6b | |
| c | Tax paid with application for extension of time to file (Form 8868) | 6c | |
| d | Backup withholding erroneously withheld | 6d | |
| 7 | Total credits and payments Add lines 6a through 6d. | 7 | 332 |
| 8 | Enter any penalty for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached | 8 | |
| 9 | Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed | 9 | |
| 10 | Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid | 10 | 180 |
| 11 | Enter the amount of line 10 to be Credited to 2015 estimated tax <input checked="" type="checkbox"/> 180 Refunded <input type="checkbox"/> | 11 | 0 |

Part VII-A Statements Regarding Activities

| | | Yes | No |
|--|---|------------|-----------|
| 1a | During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? | 1a | No |
| 1b | Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)? | 1b | No |
| <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.</i> | | | |
| 1c | Did the foundation file Form 1120-POL for this year? | 1c | No |
| d | Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation <input checked="" type="checkbox"/> \$ _____ 0 (2) On foundation managers <input checked="" type="checkbox"/> \$ _____ 0 | | |
| e | Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input checked="" type="checkbox"/> \$ _____ 0 | | |
| 2 | Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i> | 2 | No |
| 3 | Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i> | 3 | No |
| 4a | Did the foundation have unrelated business gross income of \$1,000 or more during the year? | 4a | No |
| b | If "Yes," has it filed a tax return on Form 990-T for this year? | 4b | |
| 5 | Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i> | 5 | No |
| 6 | Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either ● By language in the governing instrument, or ● By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument? | 6 | Yes |
| 7 | Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV.</i> | 7 | Yes |
| 8a | Enter the states to which the foundation reports or with which it is registered (see instructions) <input checked="" type="checkbox"/> CA | | |
| 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? <i>If "No," attach explanation.</i> | 8b | Yes |
| 9 | Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i> | 9 | No |
| 10 | Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i> | 10 | No |

Part VII-A Statements Regarding Activities (continued)

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

14 The books are in care of ► KEVIN MONSON Telephone no ► (714) 422-8541
Located at ► 18430 BROOKHURST STREET SUITE 202-N FOUNTAIN VALLEY CA ZIP +4 ► 92708

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** —Check here ► 15 and enter the amount of tax-exempt interest received or accrued during the year ►

16 At any time during calendar year 2014, 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 instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR). If "Yes", enter the name of the foreign country ►

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.

| | | | | |
|----|--|-------|------|----|
| 1a | During the year did the foundation (either directly or indirectly) | | Yes | No |
| | (1) Engage in the sale or exchange, or leasing of property with a disqualified person? | ► Yes | ✓ No | |
| | (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? | ► Yes | ✓ No | |
| | (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? | ► Yes | ✓ No | |
| | (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? | ✓ Yes | ► No | |
| | (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? | ► Yes | ✓ No | |
| | (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) | ► Yes | ✓ No | |
| b | If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? | | 1b | No |
| c | Organizations relying on a current notice regarding disaster assistance check here. ► | | 1c | No |
| 2 | 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 2014? | | 2b | |
| a | 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 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? | ► Yes | ✓ No | |
| | If "Yes," list the years ► 20____, 20____, 20____, 20____ | | | |
| b | Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions) | | 2b | |
| c | If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ► 20____, 20____, 20____, 20____ | | | |
| 3a | Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? | ► Yes | ✓ No | |
| b | If "Yes," did it have excess business holdings in 2014 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 2014) | | 3b | |
| 4a | Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? | | 4a | No |
| b | Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2014? | | 4b | No |

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

| | | | | |
|----|--|---|----|----|
| 5a | During the year did the foundation pay or incur any amount to | | | |
| | (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No | | |
| | (2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No | | |
| | (3) Provide a grant to an individual for travel, study, or other similar purposes? | <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | | |
| | (4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions). | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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? | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No | | |
| b | If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)? | | 5b | No |
| | Organizations relying on a current notice regarding disaster assistance check here. ► | | | |
| c | If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? | <input type="checkbox"/> Yes <input type="checkbox"/> No | | |
| | <i>If "Yes," attach the statement required by Regulations section 53.4945–5(d).</i> | | | |
| 6a | Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No | 6b | No |
| b | Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? | | | |
| | <i>If "Yes" to 6b, file Form 8870.</i> | | | |
| 7a | At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No | | 7b | |
| b | If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? | | | |

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 |
|--|---|---|---|---------------------------------------|
| KEVIN E MONSON PO BOX 903 SEAL BEACH, CA 90704 | TRUSTEE 10 00 | 30,000 | 0 | 0 |
| BRIAN MCMAHON PO BOX 903 SEAL BEACH, CA 90704 | TRUSTEE 10 00 | 30,000 | 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. | | | | 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 | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| Total number of others receiving over \$50,000 for professional services. | | 0 |

Part IX-A Summary of Direct Charitable Activities

| List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc | Expenses |
|---|----------|
| 1 THE FOUNDATION PRESENTED SCHOLARSHIPS TO 61 GRADUATING HIGH SCHOOL STUDENTS FOR USE IN PAYMENT OF TUITION, BOOKS, AND RELATED EDUCATIONAL EXPENSES FOR COLLEGE STUDIES | 51,000 |
| 2 THE FOUNDATION PROVIDED FINANCIAL ASSISTANCE TO AN INDIGENT FAMILY TO PAY FOR HEALTH CARE AND HOME MORTGAGE | 11,602 |
| 3 THE FOUNDATION PROVIDED FINANCIAL ASSISTANCE TO AN INDIGENT FAMILY TO LEASE A HANDICAPPED-REMODELED RESIDENCE | 9,000 |
| 4 THE FOUNDATION PROVIDED FUNDS FOR CONSTRUCTION OF A HOUSING PROJECT FOR A LOW-INCOME FAMILY IN PARKER, ARIZONA | 8,000 |

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

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

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

| | | | |
|---|--|----|---------|
| 1 | Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes | | |
| a | Average monthly fair market value of securities. | 1a | 0 |
| b | Average of monthly cash balances. | 1b | 39,673 |
| c | Fair market value of all other assets (see instructions). | 1c | 430,200 |
| d | Total (add lines 1a, b, and c). | 1d | 469,873 |
| e | Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation). | 1e | 0 |
| 2 | Acquisition indebtedness applicable to line 1 assets. | 2 | 0 |
| 3 | Subtract line 2 from line 1d. | 3 | 469,873 |
| 4 | Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions). | 4 | 7,048 |
| 5 | Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4 | 5 | 462,825 |
| 6 | Minimum investment return. Enter 5% of line 5. | 6 | 23,141 |

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

| | | | |
|----|--|----|--------|
| 1 | Minimum investment return from Part X, line 6. | 1 | 23,141 |
| 2a | Tax on investment income for 2014 from Part VI, line 5. | 2a | 152 |
| b | Income tax for 2014 (This does not include the tax from Part VI). | 2b | |
| c | Add lines 2a and 2b. | 2c | 152 |
| 3 | Distributable amount before adjustments Subtract line 2c from line 1. | 3 | 22,989 |
| 4 | Recoveries of amounts treated as qualifying distributions. | 4 | 0 |
| 5 | Add lines 3 and 4. | 5 | 22,989 |
| 6 | Deduction from distributable amount (see instructions). | 6 | 0 |
| 7 | Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1. | 7 | 22,989 |

Part XII Qualifying Distributions (see instructions)

| | | | |
|---|---|----|---------|
| 1 | Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes | | |
| a | Expenses, contributions, gifts, etc —total from Part I, column (d), line 26. | 1a | 114,077 |
| b | Program-related investments—total from Part IX-B. | 1b | 0 |
| 2 | Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes. | 2 | |
| 3 | Amounts set aside for specific charitable projects that satisfy the | | |
| a | Suitability test (prior IRS approval required). | 3a | |
| b | Cash distribution test (attach the required schedule). | 3b | |
| 4 | Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4 | 4 | 114,077 |
| 5 | Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions). | 5 | 152 |
| 6 | Adjusted qualifying distributions. Subtract line 5 from line 4. | 6 | 113,925 |
| | 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 2013 | (c) 2013 | (d) 2014 |
|--|---------------|----------------------------|-------------|-------------|
| 1 Distributable amount for 2014 from Part XI, line 7 | | | | 22,989 |
| 2 Undistributed income, if any, as of the end of 2014 | | | 0 | |
| a Enter amount for 2013 only. | | | | |
| b Total for prior years 20____, 20____, 20____ | | 0 | | |
| 3 Excess distributions carryover, if any, to 2014 | | | | |
| a From 2009. | 41,888 | | | |
| b From 2010. | 17,920 | | | |
| c From 2011. | 54,500 | | | |
| d From 2012. | 73,400 | | | |
| e From 2013. | 64,318 | | | |
| f Total of lines 3a through e. | 252,026 | | | |
| 4 Qualifying distributions for 2014 from Part XII, line 4 ► \$ _____ 114,077 | | | 0 | |
| a Applied to 2013, but not more than line 2a | | | | |
| b Applied to undistributed income of prior years (Election required—see instructions). | | 0 | | |
| c Treated as distributions out of corpus (Election required—see instructions). | 0 | | | |
| d Applied to 2014 distributable amount. | | | 22,989 | |
| e Remaining amount distributed out of corpus | 91,088 | | | |
| 5 Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a).) | 0 | | | 0 |
| 6 Enter the net total of each column as indicated below: | 343,114 | | | |
| a Corpus Add lines 3f, 4c, and 4e Subtract line 5 | | | | |
| b Prior years' undistributed income Subtract line 4b from line 2b | | 0 | | |
| c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed. | | 0 | | |
| d Subtract line 6c from line 6b Taxable amount—see instructions | | 0 | | |
| e Undistributed income for 2013 Subtract line 4a from line 2a Taxable amount—see instructions | | | 0 | |
| f Undistributed income for 2014 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015. | | | | 0 |
| 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions). | 0 | | | |
| 8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions) | 41,888 | | | |
| 9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a | 301,226 | | | |
| 10 Analysis of line 9 | | | | |
| a Excess from 2010. | 17,920 | | | |
| b Excess from 2011. | 54,500 | | | |
| c Excess from 2012. | 73,400 | | | |
| d Excess from 2013. | 64,318 | | | |
| e Excess from 2014. | 91,088 | | | |

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

| | | | | |
|-----|--|--|--|--|
| 1a | If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2014, enter the date of the ruling. | | | |
| b | Check box to indicate whether the organization is a private operating foundation described in section <input type="checkbox"/> 4942(j)(3) or <input type="checkbox"/> 4942(j)(5) | | | |
| 2a | Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed. | | | |
| b | 85% of line 2a. | | | |
| c | Qualifying distributions from Part XII, line 4 for each year listed. | | | |
| d | Amounts included in line 2c not used directly for active conduct of exempt activities. | | | |
| e | Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c. | | | |
| 3 | Complete 3a, b, or c for the alternative test relied upon | | | |
| a | "Assets" alternative test—enter | | | |
| (1) | Value of all assets. | | | |
| (2) | Value of assets qualifying under section 4942(j)(3)(B)(i). | | | |
| b | "Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. | | | |
| c | "Support" alternative test—enter | | | |
| (1) | Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties). | | | |
| (2) | Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii). | | | |
| (3) | Largest amount of support from an exempt organization | | | |
| (4) | Gross investment income | | | |

Part XV Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see instructions.)**1 Information Regarding Foundation Managers:**

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

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

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

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

a The name, address, and telephone number or email address of the person to whom applications should be addressed

See Additional Data Table

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

See Additional Data Table

c Any submission deadlines

See Additional Data Table

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

See Additional Data Table

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 Paid during the year See Additional Data Table | | | | |
| Total | | | ► 3a | 114,077 |
| b Approved for future payment | | | | |
| Total | | | ► 3b | 0 |

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

| Enter gross amounts unless otherwise indicated | Unrelated business income | | Excluded by section 512, 513, or 514 | | (e) Related or exempt function income (See instructions) |
|---|---------------------------|---------------|--------------------------------------|---------------|---|
| | (a) Business code | (b) Amount | (c) Exclusion code | (d) Amount | |
| 1 Program service revenue | | | | | |
| a _____ | | | | | |
| b _____ | | | | | |
| c _____ | | | | | |
| d _____ | | | | | |
| e _____ | | | | | |
| f _____ | | | | | |
| g Fees and contracts from government agencies | | | | | |
| 2 Membership dues and assessments. | | | | | |
| 3 Interest on savings and temporary cash investments | | | | | |
| 4 Dividends and interest from securities. | | | | | |
| 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. | | | 14 | 15,231 | |
| 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). | | 0 | | 15,231 | |
| 13 Total. Add line 12, columns (b), (d), and (e). | | | 13 | 15,231 | |

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

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

| | Yes | No |
|--|-------|----|
| 1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations? | | |
| a Transfers from the reporting foundation to a noncharitable exempt organization of | | |
| (1) Cash. | 1a(1) | No |
| (2) Other assets. | 1a(2) | No |
| b Other transactions | | |
| (1) Sales of assets to a noncharitable exempt organization. | 1b(1) | No |
| (2) Purchases of assets from a noncharitable exempt organization. | 1b(2) | No |
| (3) Rental of facilities, equipment, or other assets. | 1b(3) | No |
| (4) Reimbursement arrangements. | 1b(4) | No |
| (5) Loans or loan guarantees. | 1b(5) | No |
| (6) Performance of services or membership or fundraising solicitations. | 1b(6) | No |
| c Sharing of facilities, equipment, mailing lists, other assets, or paid employees. | 1c | No |

d If the answer to any of the above is "Yes," complete the following schedule. Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received.

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations?

described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? Yes No

b If "Yes," complete the following schedule.

| (a) Name of organization | (b) Type of organization | (c) Description of relationship |
|--------------------------|--------------------------|---------------------------------|
| | | |
| | | |
| | | |
| | | |

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

* * * * *

2015-11-05

* * * * *

Signature of officer or trustee

Date

Title

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

| | | | | | |
|---|---|----------------------|------|--|-------------------|
| Paid Preparer Use Only | Print/Type preparer's name GENE SKYLAR | Preparer's Signature | Date | Check if self-employed <input checked="" type="checkbox"/> | PTIN P01277999 |
| | Firm's name ► GORELICK & USLANER CPAS A PROF CORP | | | Firm's EIN ► 95-4538761 | |
| | Firm's address ► 15260 VENTURA BLVD STE 1705 SHERMAN OAKS, CA 91403 | | | Phone no | (818) 786-5656 |

Form 990PF Part XV Line 2a - 2d - Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

a The name, address, and telephone number of the person to whom applications should be addressed

KEVIN E MONSON
POST OFFICE BOX 903
SEAL BEACH, CA 90740
(714) 422-8541

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

THE CHOIR SCHOLARSHIP APPLICATION NEEDS TO BE COMPLETED AND SUBMITTED ALONG WITH A ONE-PAGE ESSAY
DESCRIBING FUTURE PLANS, GOALS, AND DREAMS

c Any submission deadlines

MAY 1

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

GRADUATING FROM FOUNTAIN VALLEY HIGH SCHOOL, MINIMUM 2.5 UNWEIGHTED GRADE POINT AVERAGE IN HIGH
SCHOOL, AND MINIMUM THREE YEARS PERFORMING WITH THE FOUNTAIN VALLEY HIGH SCHOOL CHOIR

a The name, address, and telephone number of the person to whom applications should be addressed

KEVIN E MONSON
POST OFFICE BOX 903
SEAL BEACH, CA 90740
(714) 422-8541

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

A BRIEF ESSAY CONTAINING PLANS FOR HOW FUNDS WILL BE USED AND PLANS FOR OVERCOMING FINANCIAL
DIFFICULTIES

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

INDIGENT FAMILIES, PRIMARILY THOSE OF SINGLE OR ABANDONED WOMEN WITH MINOR CHILDREN OR TERMINALLY ILL

Form 990PF Part XV Line 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 Paid during the year | | | | |
| ADAM JONES - PAID DIRECTLY TO UNIVERSITY OF CALIFORNIA LOS ANGELES 9349 SHRIKE AVENUE FOUNTAIN VALLEY, CA 92708 | NONE | INDIVIDUAL | SCHOLARSHIP | 1,000 |
| ADRIAN E LOPEZ - PAID DIRECTLY TO UNIVERSAL TECHNICAL 4720 WALNUT AVENUE LONG BEACH, CA 90805 | NONE | INDIVIDUAL | SCHOLARSHIP | 500 |
| ALEJANDRA MARROQUIN - PAID DIRECTLY TO CALIFORNIA STATE UNIV LONG BEACH 5351 CEDAR AVENUE LONG BEACH, CA 90805 | NONE | INDIVIDUAL | SCHOLARSHIP | 1,000 |
| ALYSSA BARUCH - PAID DIRECTLY TO LONG BEACH CITY COLLEGE 6172 LEMON AVENUE LONG BEACH, CA 90805 | NONE | INDIVIDUAL | SCHOLARSHIP | 500 |
| AMANDA GILLIS FOUNDATION 1417 N LAS VEGAS BLVD LAS VEGAS, NV 89101 | NONE | PC | DONATION TO A SHELTER FOR RUNAWAYS AND ENDANGERED YOUTHS | 5,000 |
| ANDREA ANGELICA PEREZ - PAID DIRECTLY TO CALIFORNIA STATE UNIV LONG BEACH 146 W 67TH WAY LONG BEACH, CA 90805 | NONE | INDIVIDUAL | SCHOLARSHIP | 1,000 |
| ANTHONY GHOURI - PAID DIRECTLY TO LONG BEACH CITY COLLEGE 5505 ACKERFIELD AVE APT 502 LONG BEACH, CA 90805 | NONE | INDIVIDUAL | SCHOLARSHIP | 500 |
| ASHLEY CHANG - PAID DIRECTLY TO UNIVERSITY OF CALIFORNIA LOS ANGELES 18343 SANTA JOANANA FOUNTAIN VALLEY, CA 92708 | NONE | INDIVIDUAL | SCHOLARSHIP | 1,000 |
| BENJAMIN YEH - PAID DIRECTLY TO STANFORD UNIVERSITY 4865 LINARO DRIVE CYPRESS, CA 90630 | NONE | INDIVIDUAL | SCHOLARSHIP | 1,000 |
| BLANCA A CORTES TORRES - PAID DIRECTLY TO CALIFORNIA STATE UNIV LONG BEACH 6185 LINDEN AVENUE APT 2 LONG BEACH, CA 90805 | NONE | INDIVIDUAL | SCHOLARSHIP | 500 |
| BLIND CHILDREN'S LEARNING CENTER 18542 VANDERLIP AVE B SANTA ANA, CA 92705 | NONE | PC | DONATION TO A CENTER FOR THE TRAINING AND EDUCATION OF BLIND CHILDREN | 2,500 |
| BRITTANY NGUYEN - PAID DIRECTLY TO CALIFORNIA STATE UNIVERSITY LONG BEACH 15841 LAS LUNAS STREET WESTMINSTER, CA 92683 | NONE | INDIVIDUAL | SCHOLARSHIP | 1,000 |
| CARLOS ALBERTO VILLALOBOS - PAID DIRECTLY TO UNIV OF CALIFORNIA SANTA CRUZ 5961 ELM AVENUE LONG BEACH, CA 90805 | NONE | INDIVIDUAL | SCHOLARSHIP | 1,000 |
| CAROLINE TRINH - PAID DIRECTLY TO UNIVERSITY OF CALIFORNIA SANTA BARBARA 10662 EL CAMPO AVENUE FOUNTAIN VALLEY, CA 92708 | NONE | INDIVIDUAL | SCHOLARSHIP | 1,000 |
| CAROLYN MARTIN - PAID DIRECTLY TO MAUREEN LI PO BOX 903 SEAL BEACH, CA 90740 | NONE | INDIVIDUAL | DONATION TO FUNDRAISER FOR INDIGENT FAMILY | 2,500 |
| Total | | | | 114,077 |
| | | | ► 3a | |

Form 990PF Part XV Line 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 Paid during the year | | | | |
| CASANOVA HOUSE FUND PO BOX 903 SEAL BEACH, CA 90740 | NONE | NC | DONATION TO A HOUSING PROJECT FOR A LOW-INCOME FAMILY | 8,000 |
| CECILIA ZAVALA - PAID DIRECTLY TO UNIVERSITY OF CALIFORNIA LOS ANGELES 157 E 67TH WAY LONG BEACH, CA 90805 | NONE | INDIVIDUAL | SCHOLARSHIP | 500 |
| CHRISTINA CHOATE - PAID DIRECTLY TO CALVARY CHAPEL BIBLE COLLEGE 9134 CARDINAL AVENUE FOUNTAIN VALLEY, CA 92708 | NONE | INDIVIDUAL | SCHOLARSHIP | 1,000 |
| CHRISTOPHER YEH - PAID DIRECTLY TO STANFORD UNIVERSITY 4865 LINARO DRIVE CYPRESS, CA 90630 | NONE | INDIVIDUAL | SCHOLARSHIP | 1,000 |
| CINDY ARMENDARIZ - PAID DIRECTLY TO UNIVERSITY OF CALIFORNIA IRVINE 5690 WALNUT AVENUE LONG BEACH, CA 90805 | NONE | INDIVIDUAL | SCHOLARSHIP | 1,000 |
| COVENANT HOUSE 5 PENN PLAZA NEW YORK, NY 10001 | NONE | PC | DONATION TO A SHELTER FOR ABANDONED AND ENDANGERED WOMEN AND CHILDREN | 2,000 |
| CYNTHIA MARTINEZ - PAID DIRECTLY TO ORANGE COAST COLLEGE 815 LOMA AVENUE APT 6 LONG BEACH, CA 90804 | NONE | INDIVIDUAL | SCHOLARSHIP | 1,000 |
| DANIELA LARA - PAID DIRECTLY TO LONG BEACH CITY COLLEGE 1143 EAST VIA WANDA NO 57 LONG BEACH, CA 90805 | NONE | INDIVIDUAL | SCHOLARSHIP | 500 |
| DEAN STUART REEVES - PAID DIRECTLY TO CALIFORNIA STATE UNIV LONG BEACH 3342 BRADBURY ROAD UNIT 26 LOS ALAMITOS, CA 90720 | NONE | INDIVIDUAL | SCHOLARSHIP | 1,000 |
| DELANEY LEMASTER-DWYER - PAID DIRECTLY TO UNIV OF CALIFORNIA BERKELEY 11452 HARRISBURG ROAD ROSSMOOR, CA 90720 | NONE | INDIVIDUAL | SCHOLARSHIP | 1,000 |
| DINH NGUYEN ORPHANAGE PO BOX 903 SEAL BEACH, CA 90740 | NONE | VIETNAMESE CHARITY | DONATION TO AN ORPHANAGE | 2,500 |
| EDISON HIGH SCHOOL 21400 MAGNOLIA STREET HUNTINGTON BEACH, CA 92646 | NONE | PC | DONATION TO HIGH SCHOOL PERFORMING ART PROGRAM | 3,000 |
| ELSIE GUTIERREZ - PAID DIRECTLY TO CALIFORNIA STATE UNIVERSITY LONG BEACH 1711 E 63RD STREET LONG BEACH, CA 90805 | NONE | INDIVIDUAL | SCHOLARSHIP | 500 |
| EMMANUEL CARDENA - PAID DIRECTLY TO CALIFORNIA STATE UNIVERSITY LONG BEACH 18071 WHARTON LANE HUNTINGTON BEACH, CA 92646 | NONE | INDIVIDUAL | SCHOLARSHIP | 1,000 |
| ERASMO JOSEPH LOPEZ - PAID DIRECTLY TO CALIFORNIA STATE UNIV MONTEREY BAY 4812 GUNDY AVENUE LONG BEACH, CA 90807 | NONE | INDIVIDUAL | SCHOLARSHIP | 1,000 |
| Total | | | ► 3a | 114,077 |

Form 990PF Part XV Line 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 Paid during the year | | | | |
| EUN SOL LEE - PAID DIRECTLY TO TRINITY UNIVERSITY 16125 CONUTA AVENUE BELLFLOWER, CA 90706 | NONE | INDIVIDUAL | SCHOLARSHIP | 1,000 |
| FABIOLA CERVANTES - PAID DIRECTLY TO CALIFORNIA STATE UNIV LONG BEACH 11570 DARTMOUTH DRIVE NORWALK, CA 90650 | NONE | INDIVIDUAL | SCHOLARSHIP | 500 |
| GABRIELA HERNANDEZ - PAID DIRECTLY TO CALIFORNIA STATE UNIV LONG BEACH 319 E NEECE STREET LONG BEACH, CA 90805 | NONE | INDIVIDUAL | SCHOLARSHIP | 500 |
| GECHHONG HUY - PAID DIRECTLY TO LONG BEACH CITY COLLEGE 1212 MYRTLE AVENUE LONG BEACH, CA 90813 | NONE | INDIVIDUAL | SCHOLARSHIP | 1,000 |
| GEORGE RODRIGUEZ - PAID DIRECTLY TO CALIFORNIA STATE UNIVERSITY LONG BEACH 6801 CALIFORNIA AVENUE LONG BEACH, CA 90805 | NONE | INDIVIDUAL | SCHOLARSHIP | 500 |
| GIUP-JASON PARK - PAID DIRECTLY TO STANBRIDGE COLLEGE 8832 WILLIAMSBURG AVENUE WESTMINSTER, CA 92683 | NONE | INDIVIDUAL | SCHOLARSHIP | 1,000 |
| GLADYS MUÑOZ - PAID DIRECTLY TO CALIFORNIA STATE UNIVERSITY LONG BEACH 1711 E 63RD STREET LONG BEACH, CA 90805 | NONE | INDIVIDUAL | SCHOLARSHIP | 500 |
| HAILEY WIGOD - PAID DIRECTLY TO UNIVERSITY OF REDLANDS 173 STANFORD LANE SEAL BACH, CA 90740 | NONE | INDIVIDUAL | SCHOLARSHIP | 1,000 |
| INTERVAL HOUSE PO BOX 3356 SEAL BEACH, CA 90740 | NONE | PC | DONATION TO A SHELTER FOR TROUBLED YOUTH | 2,500 |
| JACQUELIN PINEDA - PAID DIRECTLY TO CALIFORNIA STATE UNIVERSITY LONG BEACH 3024 E CADE STREET LONG BEACH, CA 92805 | NONE | INDIVIDUAL | SCHOLARSHIP | 500 |
| JASON ANDREW ALLISON - PAID DIRECTLY TO UNIVERSITY OF CALIFORNIA IRVINE 16588 SEQUOIA STREET FOUNTAIN VALLEY, CA 92708 | NONE | INDIVIDUAL | SCHOLARSHIP | 1,000 |
| JAZLYN BARRIENTOS - PAID DIRECTLY TO UNIVERSITY OF CALIFORNIA SAN DIEGO 7128 N ATLANTIC PLACE LONG BEACH, CA 90805 | NONE | INDIVIDUAL | SCHOLARSHIP | 1,000 |
| JENNIFER L ORTIZ - PAID DIRECTLY TO UNIVERSITY OF CALIFORNIA IRVINE 6549 LEMON AVENUE LONG BEACH, CA 90805 | NONE | INDIVIDUAL | SCHOLARSHIP | 500 |
| JIMMY NGUYEN - PAID DIRECTLY TO UNIVERSITY OF CALIFORNIA RIVERSIDE 7511 BAYLOR DRIVE APT C WESTMINSTER, CA 92683 | NONE | INDIVIDUAL | SCHOLARSHIP | 1,000 |
| JOCELYN SOTO - PAID DIRECTLY TO CALIFORNIA STATE UNIVERSITY LONG BEACH 55 W ZANE STREET LONG BEACH, CA 90805 | NONE | INDIVIDUAL | SCHOLARSHIP | 1,000 |
| Total | | | | 114,077 |
| ► 3a | | | | |

Form 990PF Part XV Line 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 Paid during the year | | | | |
| JORGE A SALDANA - PAID DIRECTLY TO LONG BEACH COAST COLLEGE 1665 E CURRY STREET LONG BEACH, CA 90805 | NONE | INDIVIDUAL | SCHOLARSHIP | 500 |
| JORGE DANIEL PINEDA DURAN - PAID DIRECTLY TO LONG BEACH CITY COLLEGE 3024 E CADE STREET LONG BEACH, CA 92805 | NONE | INDIVIDUAL | SCHOLARSHIP | 500 |
| JOSE A SANCHEZ - PAID DIRECTLY TO CALIFORNIA STATE UNIVERSITY LONG BEACH 5463 MYRTLE AVENUE LONG BEACH, CA 90805 | NONE | INDIVIDUAL | SCHOLARSHIP | 1,000 |
| JOSIE ROJAS - PAID DIRECTLY TO UNIVERSITY OF CALIFORNIA SAN DIEGO 1054 E MARKET STREET APT 1 LONG BEACH, CA 90805 | NONE | INDIVIDUAL | SCHOLARSHIP | 1,000 |
| KATHY ROBINSON PO BOX 903 SEAL BEACH, CA 90740 | NONE | INDIVIDUAL | ASSISTANCE TO INDIGENT FAMILY | 1,424 |
| KIWANIS INTERNATIONAL 3636 WOODVIEW TRACE INDIANAPOLIS, IN 46268 | NONE | PC | DONATION TO SUPPORT SERVICE PROJECTS OF KIWANIS INTERNATIONAL | 500 |
| KRISTAL CHAN - PAID DIRECTLY TO UNIVERSITY OF CALIFORNIA SANTA CRUZ 10662 OAK STREET LOS ALAMITOS, CA 90720 | NONE | INDIVIDUAL | SCHOLARSHIP | 1,000 |
| LDS CHURCH 17500 BUSHARD STREET FOUNTAIN VALLEY, CA 92708 | NONE | PC | DONATION TO MISSIONARIES | 4,800 |
| LEAH FEIGHNER - PAID DIRECTLY TO UNIVERSITY OF CALIFORNIA LOS ANGELES 11381D DRYSDALE LOS ALAMITOS, CA 90720 | NONE | INDIVIDUAL | SCHOLARSHIP | 1,000 |
| MACKENZIE LYN SHEPPARD - PAID DIRECTLY TO CALIFORNIA STATE UNIV FULLERTON 8709 EL COSTA CIRCLE LONG BEACH, CA 90805 | NONE | INDIVIDUAL | SCHOLARSHIP | 1,000 |
| MAOLENG OUK - PAID DIRECTLY TO CALIFORNIA STATE UNIVERSITY FULLERTON 5535 LIME AVENUE LONG BEACH, CA 90805 | NONE | INDIVIDUAL | SCHOLARSHIP | 1,000 |
| MASUDA MIDDLE SCHOOL 17415 LOS JARDINES W FOUNTAIN VALLEY, CA 92708 | NONE | PC | DONATION TO MIDDLE SCHOOL IN ACQUISITION OF COMPUTERS AND LEARNING CENTER MATERIALS | 1,000 |
| MATTHEW BARKER - PAID DIRECTLY TO BRIGHAM YOUNG UNIVERSITY 5492 MYRA AVENUE CYPRESS, CA 90630 | NONE | INDIVIDUAL | SCHOLARSHIP | 1,000 |
| MICHAEL QUERRY - PAID DIRECTLY TO GOLDEN WEST COLLEGE 10676 LA TEHAMA CIRCLE FOUNTAIN VALLEY, CA 92708 | NONE | INDIVIDUAL | SCHOLARSHIP | 1,000 |
| MIGUEL A CRUZ - PAID DIRECTLY TO CALIFORNIA STATE UNIVERSITY LONG BEACH 6475 ATLANTIC AVE NO 372 LONG BEACH, CA 90805 | NONE | INDIVIDUAL | SCHOLARSHIP | 500 |
| Total | | | | 114,077 |
| | | | ► 3a | |

Form 990PF Part XV Line 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 Paid during the year | | | | |
| MONICA BANKS - PAID DIRECTLY TO OCCIDENTAL COLLEGE 2825 NEWCASTLE WAY SAN JACINTO, CA 92582 | NONE | INDIVIDUAL | SCHOLARSHIP | 500 |
| PRECIOUS LAMBS PRESCHOOL INC 2005 PALO VERDE AVE PMB 301 LONG BEACH, CA 90815 | NONE | PC | DONATION TO HOME FOR ABANDONED AND ENDANGERED CHILDREN | 2,000 |
| RACHEL CHUNG - PAID DIRECTLY TO NORTHEASTERN UNIVERSITY 6415 E BIXBY HILL ROAD LONG BEACH, CA 92815 | NONE | INDIVIDUAL | SCHOLARSHIP | 1,000 |
| RESPLENDENT HOPE 236 SEVENTH STREET SEAL BEACH, CA 90740 | NONE | PC | DONATION TO A HOSPITAL | 2,500 |
| RICARDO ANTHONY DE LA TORRE - PAID DIRECTLY TO CAL STATE UNIV LONG BEACH 350 E POPPY STREET LONG BEACH, CA 90805 | NONE | INDIVIDUAL | SCHOLARSHIP | 1,000 |
| ROBERT & DINA GIANGREGORIO - PAID DIRECTLY TO CHERI KOHLER PO BOX 903 SEAL BEACH, CA 90740 | NONE | INDIVIDUAL | DONATION TO INDIGENT FAMILY | 9,000 |
| ROBERT BRAVO - PAID DIRECTLY TO LONG BEACH CITY COLLEGE 1630 E 63RD STREET LONG BEACH, CA 90805 | NONE | INDIVIDUAL | SCHOLARSHIP | 500 |
| ROMAN RODRIGUEZ - PAID DIRECTLY TO CALIFORNIA STATE UNIVERSITY LONG BEACH 15610 S WILLIAMS AVENUE COMPTON, CA 90221 | NONE | INDIVIDUAL | SCHOLARSHIP | 500 |
| RUSS TROUNCE - PAID DIRECTLY TO BLUE SHIELD AND HEALTH NET PO BOX 903 SEAL BEACH, CA 90740 | NONE | INDIVIDUAL | ASSISTANCE TO INDIGENT FAMILY | 1,162 |
| RUSS TROUNCE - PAID DIRECTLY TO CHASE BANK PO BOX 903 SEAL BEACH, CA 90740 | NONE | INDIVIDUAL | ASSISTANCE TO INDIGENT FAMILY | 1,551 |
| RUSS TROUNCE - PAID DIRECTLY TO WELLS FARGO BANK PO BOX 903 SEAL BEACH, CA 90740 | NONE | INDIVIDUAL | ASSISTANCE TO INDIGENT FAMILY | 8,890 |
| SEAL BEACH ANIMAL SHELTER 1700 ADOLFO LOPEZ DRIVE SEAL BEACH, CA 90740 | NONE | PC | DONATION TO SUPPORT THE HUMANE TREATMENT OF LOST AND ENDANGERED ANIMALS | 1,000 |
| SEAL BEACH POLICE FOUNDATION 1198 PCH 209 SEAL BEACH, CA 90740 | NONE | PC | DONATION TO SUPPORT THE WIDOWS AND ORPHANS FUND OF A POLICE ASSOCIATION | 1,250 |
| STEFANIA POMBO - PAID DIRECTLY TO CALIFORNIA STATE UNIVERSITY BERKELEY 9177 NADINE RIVER CIRCLE FOUNTAIN VALLEY, CA 92708 | NONE | INDIVIDUAL | SCHOLARSHIP | 1,000 |
| TANNER POE - PAID DIRECTLY TO CHANDLER COMMUNITY COLLEGE 11102 ESSEX DRIVE LOS ALAMITOS, CA 90720 | NONE | INDIVIDUAL | SCHOLARSHIP | 1,000 |
| Total | | | | ► 3a 114,077 |

Form 990PF Part XV Line 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 Paid during the year | | | | |
| TEA KING - PAID DIRECTLY TO UNIVERSITY OF CALIFORNIA LOS ANGELES 6771 CERRITOS AVENUE LONG BEACH, CA 90805 | NONE | INDIVIDUAL | SCHOLARSHIP | 1,000 |
| TRISTIN MAULDIN - PAID DIRECTLY TO UNIVERSITY OF CALIFORNIA IRVINE 11192 MINDORA STREET LOS ALAMITOS, CA 90720 | NONE | INDIVIDUAL | SCHOLARSHIP | 1,000 |
| VALERIE STARK - PAID DIRECTLY TO UNIVERSITY OF CALIFORNIA SAN DIEGO 10333 CARDINAL AVENUE FOUNTAIN VALLEY, CA 92708 | NONE | INDIVIDUAL | SCHOLARSHIP | 1,000 |
| VERONICA CRUZ - PAID DIRECTLY TO CALIFORNIA STATE UNIVERSITY LONG BEACH 1220 E 64TH STREET LONG BEACH, CA 90805 | NONE | INDIVIDUAL | SCHOLARSHIP | 1,000 |
| VYRRYA KOEUNG - PAID DIRECTLY TO LONG BEACH CITY COLLEGE 6417 CALIFORNIA AVENUE LONG BEACH, CA 90805 | NONE | INDIVIDUAL | SCHOLARSHIP | 1,000 |
| YONIQUE EDWARDS - PAID DIRECTLY TO UNIVERSITY OF CALIFORNIA DAVIS 1800 E 63RD STREET LONG BEACH, CA 90805 | NONE | INDIVIDUAL | SCHOLARSHIP | 500 |
| Total | | | ► 3a | 114,077 |

TY 2014 Accounting Fees Schedule

Name: CECILE STEPHENS CHARITABLE FOUNDATION

EIN: 20-1106340

| Category | Amount | Net Investment Income | Adjusted Net Income | Disbursements for Charitable Purposes |
|--------------------------------|--------|-----------------------|---------------------|---------------------------------------|
| ACCOUNTING AND TAX PREPARATION | 3,320 | 0 | | 0 |

TY 2014 Investments - Other Schedule

Name: CECILE STEPHENS CHARITABLE FOUNDATION**EIN:** 20-1106340

| Category / Item | Listed at Cost or FMV | Book Value | End of Year Fair Market Value |
|-----------------|-----------------------|------------|-------------------------------|
| ANNUITIES | AT COST | 374,181 | 372,637 |

TY 2014 Other Expenses Schedule

Name: CECILE STEPHENS CHARITABLE FOUNDATION**EIN:** 20-1106340

| Description | Revenue and Expenses per Books | Net Investment Income | Adjusted Net Income | Disbursements for Charitable Purposes |
|------------------|-----------------------------------|--------------------------|---------------------|--|
| POST OFFICE FEES | 62 | 0 | | 0 |

TY 2014 Other Income Schedule

Name: CECILE STEPHENS CHARITABLE FOUNDATION**EIN:** 20-1106340

| Description | Revenue And Expenses Per Books | Net Investment Income | Adjusted Net Income |
|--|--------------------------------|-----------------------|---------------------|
| ANNUITY - LINCOLN BENEFIT LIFE COMPANY 46894 | 3,912 | 3,912 | 3,912 |
| ANNUITY - LINCOLN BENEFIT LIFE COMPANY 97859 | 11,319 | 11,319 | 11,319 |

TY 2014 Taxes Schedule

Name: CECILE STEPHENS CHARITABLE FOUNDATION**EIN:** 20-1106340

| Category | Amount | Net Investment Income | Adjusted Net Income | Disbursements for Charitable Purposes |
|--------------------------------|--------|-----------------------|---------------------|---------------------------------------|
| US TREASURY | 8 | 0 | | 0 |
| US TREASURY | 171 | 0 | | 0 |
| CA ATTORNEY GENERAL'S REGISTRY | 50 | 0 | | 0 |

OMB No 1545-0047

Schedule of Contributors

2014

- Attach to Form 990, 990-EZ, or 990-PF.
- Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at www.irs.gov/form990.

Name of the organization

CECILE STEPHENS CHARITABLE FOUNDATION

Employer identification number

20-1106340

Organization type (check one)

Filers of:

Section:

| | |
|--------------------|---|
| Form 990 or 990-EZ | <input type="checkbox"/> 501(c)() (enter number) organization |
| | <input type="checkbox"/> 4947(a)(1) nonexempt charitable trust not treated as a private foundation |
| | <input type="checkbox"/> 527 political organization |
| Form 990-PF | <input checked="" type="checkbox"/> 501(c)(3) exempt private foundation |
| | <input type="checkbox"/> 4947(a)(1) nonexempt charitable trust treated as a private foundation |
| | <input type="checkbox"/> 501(c)(3) taxable private foundation |

Check if your organization is covered by the **General Rule** or a **Special Rule**.

Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or other property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

- For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 $\frac{1}{3}$ % support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and II
- For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals Complete Parts I, II, and III
- For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc , purposes, but no such contributions totaled more than \$1,000 If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc , purpose Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc , contributions totaling \$5,000 or more during the year ► \$

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

| | |
|--|---|
| Name of organization CECILE STEPHENS CHARITABLE FOUNDATION | Employer identification number 20-1106340 |
|--|---|

| Part I Contributors (see instructions) Use duplicate copies of Part I if additional space is needed | | | |
|---|--|-----------------------------------|---|
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution |
| 1 | THOMAS AND KELLY OLDS 56 GOLDEN EAGLE IRVINE, CA 92660 | \$ 50,000 | Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions) |
| | | \$ _____ | Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions) |
| | | \$ _____ | Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions) |
| | | \$ _____ | Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions) |
| | | \$ _____ | Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions) |
| | | \$ _____ | Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions) |
| | | \$ _____ | Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions) |
| | | \$ _____ | Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions) |
| | | \$ _____ | Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions) |

| | | | |
|---|---------------------|--|--|
| Name of organization CECILE STEPHENS CHARITABLE FOUNDATION | | | Employer identification number 20-1106340 |
| Part III Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ► \$ _____ Use duplicate copies of Part III if additional space is needed | | | |
| (a) No. from Part I | (b) Purpose of gift | (c) Use of gift | (d) Description of how gift is held |
| — | _____ | _____ | _____ |
| (e) Transfer of gift Transferee's name, address, and ZIP 4 | | Relationship of transferor to transferee | |
| — | _____ | _____ | _____ |
| (a) No. from Part I | (b) Purpose of gift | (c) Use of gift | (d) Description of how gift is held |
| — | _____ | _____ | _____ |
| (e) Transfer of gift Transferee's name, address, and ZIP 4 | | Relationship of transferor to transferee | |
| — | _____ | _____ | _____ |
| (a) No. from Part I | (b) Purpose of gift | (c) Use of gift | (d) Description of how gift is held |
| — | _____ | _____ | _____ |
| (e) Transfer of gift Transferee's name, address, and ZIP 4 | | Relationship of transferor to transferee | |
| — | _____ | _____ | _____ |
| (a) No. from Part I | (b) Purpose of gift | (c) Use of gift | (d) Description of how gift is held |
| — | _____ | _____ | _____ |
| (e) Transfer of gift Transferee's name, address, and ZIP 4 | | Relationship of transferor to transferee | |
| — | _____ | _____ | _____ |