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Form **990-PF**

Department of the Treasury  
Internal Revenue Service

Return of Private Foundation

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

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

OMB No 1545-0052

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		<b>A Employer identification number</b>  20-1106340	
Number and street (or P O box number if mail is not delivered to street address) PO BOX 903		<b>B Telephone number</b> (see instructions)  (714) 422-8541	
City or town, state or province, country, and ZIP or foreign postal code SEAL BEACH, CA 90740		<b>C</b> If exemption application is pending, check here <input type="checkbox"/>	
<b>G</b> Check all that apply <input type="checkbox"/> Initial return <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		<b>D 1.</b> Foreign organizations, check here <input type="checkbox"/> <b>2.</b> Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
<b>H</b> 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		<b>E</b> If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
<b>I</b> Fair market value of all assets at end of year (from Part II, col. (c), line 16)▶\$ 443,601		<b>F</b> If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
<b>J</b> 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 <small>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions) )</small>		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	<b>1</b> Contributions, gifts, grants, etc , received (attach schedule) . . . . .	51,836			
	<b>2</b> Check <input type="checkbox"/> if the foundation is <b>not</b> required to attach Sch B . . . . .				
	<b>3</b> Interest on savings and temporary cash investments				
	<b>4</b> Dividends and interest from securities. . . . .				
	<b>5a</b> Gross rents . . . . .				
	<b>b</b> Net rental income or (loss) _____				
	<b>6a</b> Net gain or (loss) from sale of assets not on line 10				
	<b>b</b> Gross sales price for all assets on line 6a _____				
	<b>7</b> Capital gain net income (from Part IV, line 2) . . .		0		
	<b>8</b> Net short-term capital gain . . . . .				
	<b>9</b> Income modifications . . . . .				
	<b>10a</b> Gross sales less returns and allowances				
	<b>b</b> Less Cost of goods sold . . . . .				
	<b>c</b> Gross profit or (loss) (attach schedule) . . . . .				
	<b>11</b> Other income (attach schedule) . . . . .	15,231	15,231		
	<b>12 Total.</b> Add lines 1 through 11 . . . . .	67,067	15,231		
Operating and Administrative Expenses	<b>13</b> Compensation of officers, directors, trustees, etc	60,000	0		0
	<b>14</b> Other employee salaries and wages . . . . .				
	<b>15</b> Pension plans, employee benefits . . . . .				
	<b>16a</b> Legal fees (attach schedule) . . . . .				
	<b>b</b> Accounting fees (attach schedule) . . . . .	3,320	0		0
	<b>c</b> Other professional fees (attach schedule) . . . . .				
	<b>17</b> Interest . . . . .				
	<b>18</b> Taxes (attach schedule) (see instructions) . . .	229	0		0
	<b>19</b> Depreciation (attach schedule) and depletion . . .				
	<b>20</b> Occupancy . . . . .				
	<b>21</b> Travel, conferences, and meetings . . . . .				
	<b>22</b> Printing and publications . . . . .				
	<b>23</b> Other expenses (attach schedule) . . . . .	62	0		0
	<b>24 Total operating and administrative expenses.</b> Add lines 13 through 23 . . . . .	63,611	0		0
	<b>25</b> Contributions, gifts, grants paid . . . . .	114,077			114,077
	<b>26 Total expenses and disbursements.</b> Add lines 24 and 25	177,688	0		114,077
	<b>27</b> Subtract line 26 from line 12				
	<b>a Excess of revenue over expenses and disbursements</b>	-110,621			
	<b>b Net investment income</b> (if negative, enter -0-)		15,231		
	<b>c Adjusted net income</b> (if negative, enter -0-)				

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 . . . . .	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) ▶ _____			
Liabilities	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
	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 ▶ _____)			
Net Assets or Fund Balances	23	Total liabilities (add lines 17 through 22) . . . . .	0	0	
		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) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))	
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any		
a				
b				
c				
d				
e				
2	Capital gain net income or (net capital loss) <div>If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7</div>		2	
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) <div>If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8</div>		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 VIExcise 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 type="checkbox"/> and enter "N/A" on line 1			
Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)					
b		Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b . . . . .		1	152
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-AStatements Regarding Activities

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

Part VII-A

Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address N/A				
14	The books are in care of 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 and enter the amount of tax-exempt interest received or accrued during the year.	15		
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?	16	Yes	No
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.			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? 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)? Organizations relying on a current notice regarding disaster assistance check here.	1b		No
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 2014?.	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014?. 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))?

☐ 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 4945(d)(4)(A)? (see instructions).

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No

b

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

5b

No

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

c

If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

☐ Yes ☐ No

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

6a

Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

b

Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

6b

No

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

7a

At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

b

If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

7b

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	TRUSTEE	30,000	0	0
PO BOX 903	10 00			
SEAL BEACH, CA 90704				
BRIAN MCMAHON	TRUSTEE	30,000	0	0
PO BOX 903	10 00			
SEAL BEACH, CA 90704				

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. <div></div>		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 GRAUDATING 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. <div></div>	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				
a Enter amount for 2013 only. . . . .			0	
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				
a Applied to 2013, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions). . . . .		0		
c Treated as distributions out of corpus (Election required—see instructions). . . . .	0			
d Applied to 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:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	343,114			
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

**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. . . .

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

	Tax year	Prior 3 years			(e) Total
	(a) 2014	(b) 2013	(c) 2012	(d) 2011	
<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 . . . . .					
<b>b</b> 85% of line 2a . . . . .					
<b>c</b> Qualifying distributions from Part XII, line 4 for each year listed . . . . .					
<b>d</b> Amounts included in line 2c not used directly for active conduct of exempt activities . . . . .					
<b>e</b> Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c . . . . .					
<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 . . . . .					
<b>(2)</b> Value of assets qualifying under section 4942(j)(3)(B)(i)					
<b>b</b> "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . . . .					
<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). . . . .					
<b>(2)</b> Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii). . . . .					
<b>(3)</b> Largest amount of support from an exempt organization					
<b>(4)</b> 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:

■ 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) )

• 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

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2014)



**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)				
<b>a</b> <i>Paid during the year</i>				
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
<b>Total . . . . .</b>  <b>3a</b>				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)				
<b>a</b> 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 GUNDRY AVENUE LONG BEACH,CA 90807	NONE	INDIVIDUAL	SCHOLARSHIP	1,000
<b>Total . . . . . ▶ 3a</b>				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)				
<b>a</b> 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 MUNOZ - 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
<b>Total</b> . . . . .  <b>3a</b>				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)				
<b>a</b> 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 FEIGNER - 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
MAO LENG 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
<b>Total . . . . .</b>  <b>3a</b>				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)				
<b>a</b> <i>Paid during the year</i>				
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
<b>Total . . . . .</b>  <b>3a</b>				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)				
<b>a</b> <i>Paid during the year</i>				
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
<b>Total . . . . .</b>			<b>3a</b>	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

<div>Schedule B</div> <div>(Form 990, 990-EZ, or 990-PF)</div> <div>Department of the Treasury Internal Revenue Service</div>	<div>Schedule of Contributors</div> <div>▶ Attach to Form 990, 990-EZ, or 990-PF.</div> <div>▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at <a href="http://www.irs.gov/form990">www.irs.gov/form990</a>.</div>	<div>OMB No 1545-0047</div> <div>2014</div>
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<div>Name of the organization</div> <div>CECILE STEPHENS CHARITABLE FOUNDATION</div>	<div>Employer identification number</div> <div>20-1106340</div>
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Organization type (check one)

<div>Filers of:</div> <div>Form 990 or 990-EZ</div> <div>Form 990-PF</div>	<div>Section:</div> <div><div><input type="checkbox"/> 501(c)( ) (enter number) organization</div><div><input type="checkbox"/> 4947(a)(1) nonexempt charitable trust <b>not</b> treated as a private foundation</div><div><input type="checkbox"/> 527 political organization</div><div><input checked="" type="checkbox"/> 501(c)(3) exempt private foundation</div><div><input type="checkbox"/> 4947(a)(1) nonexempt charitable trust treated as a private foundation</div><div><input type="checkbox"/> 501(c)(3) taxable private foundation</div></div>
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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<sup>1</sup>/<sub>3</sub>% 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).

**Employer identification number**  
20-1106340

(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 )
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )

<b>Name of organization</b> CECILE STEPHENS CHARITABLE FOUNDATION	<b>Employer identification number</b> 20-1106340
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<b>Part II</b> Noncash Property (see instructions) Use duplicate copies of Part II if additional space is needed			
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	_____ \$	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	_____ \$	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	_____ \$	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	_____ \$	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	_____ \$	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	_____ \$	_____

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