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

OMB No. 1545-0052

2014

Open to Public Inspection

Department of the Treasury
Internal Revenue Service▶ Do not enter social security numbers on this form as it may be made public.
▶ Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf.

For calendar year 2014 or tax year beginning , 2014, and ending , 20

Name of foundation Evergreen Deveopment Foundation		A Employer identification number 20-1812585
Number and street (or P.O. box number if mail is not delivered to street address) 200 N. Maryland Avenue	Room/suite 201	B Telephone number (see instructions) 818-240-8727
City or town, state or province, country, and ZIP or foreign postal code Glendale, CA 91206		C If exemption application is pending, check here ▶ <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1. Foreign organizations, check here . . . ▶ <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation . . . ▶ <input type="checkbox"/> 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) ▶ \$ 368,374	J Accounting method: <input type="checkbox"/> Cash <input type="checkbox"/> Accrual <input checked="" type="checkbox"/> Other (specify) Modified Cash (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)	3,662			
	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	10,846	10,846		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	10,508			
	b Gross sales price for all assets on line 6a 127,452				
	7 Capital gain net income (from Part IV, line 2)		10,508		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less: Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	25,016	21,354	N/A	
	13 Compensation of officers, directors, trustees, etc.				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	500	500		
	c Other professional fees (attach schedule)	1,610	1,610		
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	314			
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	218	218		
	24 Total operating and administrative expenses. Add lines 13 through 23	2,642	2,328	N/A	
	25 Contributions, gifts, grants paid	36,621			36,621
	26 Total expenses and disbursements. Add lines 24 and 25	39,263	2,328	N/A	36,621
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	(14,247)			
	b Net investment income (if negative, enter -0-)		19,026		
	c Adjusted net income (if negative, enter -0-)			N/A	

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value		
Assets	1 Cash—non-interest-bearing					
	2 Savings and temporary cash investments	21,530	10,072	10,072		
	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)	357,746	358,302	358,302		
	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)						
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)	379,276	368,374	368,374			
Liabilities	17 Accounts payable and accrued expenses					
	18 Grants payable					
	19 Deferred revenue					
	20 Loans from officers, directors, trustees, and other disqualified persons					
	21 Mortgages and other notes payable (attach schedule)					
	22 Other liabilities (describe ▶)					
	23 Total liabilities (add lines 17 through 22)					
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.					
	24 Unrestricted	349,501	368,124			
	25 Temporarily restricted	29,775	250			
	26 Permanently restricted					
	Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 27 through 31.					
	27 Capital stock, trust principal, or current funds					
	28 Paid-in or capital surplus, or land, bldg., and equipment fund					
	29 Retained earnings, accumulated income, endowment, or other funds					
	30 Total net assets or fund balances (see instructions)					
	31 Total liabilities and net assets/fund balances (see instructions)	379,276	368,374			

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	379,276
2 Enter amount from Part I, line 27a	2	(14,247)
3 Other increases not included in line 2 (itemize) ▶ Unrealized appreciation of investments	3	3,345
4 Add lines 1, 2, and 3	4	368,374
5 Decreases not included in line 2 (itemize) ▶	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	368,374

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 UBS Financial Services A/C WH 08638 SH - schedule attached	P	Various	Various
b UBS financial Services A/C WH 22339 SH - schedule attached	P	Various	Various
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			10,203
b			305
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))
(j) F.M.V. as of 12/31/69	(k) Adjusted basis as of 12/31/69	(l) Excess of col. (j) over col. (k), if any	
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	10,508
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.

(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	17,332	361,263	.047976
2012	16,871	340,857	.049496
2011	17,295	342,715	.050465
2010	11,417	302,859	.037697
2009	15,680	267,485	.058620

2 Total of line 1, column (d)	2	.244254
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	.048851
4 Enter the net value of noncharitable-use assets for 2014 from Part X, line 5	4	368,218
5 Multiply line 4 by line 3	5	17,988
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	190
7 Add lines 5 and 6	7	18,178
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.	8	36,621

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see 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		190
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).			
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2		
3	Add lines 1 and 2	3		190
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4		
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5		190
6	Credits/Payments:			
a	2014 estimated tax payments and 2013 overpayment credited to 2014	6a		
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		
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		190
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11	Enter the amount of line 10 to be: Credited to 2015 estimated tax Refunded	11		

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		<input checked="" type="checkbox"/>
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)? <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>		<input checked="" type="checkbox"/>
c Did the foundation file Form 1120-POL for this year?		<input checked="" type="checkbox"/>
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ \$ (2) On foundation managers. ▶ \$		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>		<input checked="" type="checkbox"/>
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>		<input checked="" type="checkbox"/>
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		<input checked="" type="checkbox"/>
b If "Yes," has it filed a tax return on Form 990-T for this year?		
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>		<input checked="" type="checkbox"/>
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?		<input checked="" type="checkbox"/>
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>	<input checked="" type="checkbox"/>	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ 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 <i>General Instruction G</i> ? <i>If "No," attach explanation</i>	<input checked="" type="checkbox"/>	
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>		<input checked="" type="checkbox"/>
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>		<input checked="" type="checkbox"/>

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		<input checked="" type="checkbox"/>
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		<input checked="" type="checkbox"/>
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	<input checked="" type="checkbox"/>	
14	The books are in care of ► Laurie Skipper Located at ► 200 N. Maryland Avenue, #201, Glendale, CA	Telephone no. ► 818-240-8727 ZIP+4 ► 91206		
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		<input type="checkbox"/>
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 the instructions for exceptions and filing requirements for FinCEN Form 114, (formerly TD F 90-22.1). If "Yes," enter the name of the foreign country ►	16	Yes	No <input checked="" type="checkbox"/>

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

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

		Yes	No
1a	During the year did the foundation (either directly or indirectly):		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person? . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?	1b	
	Organizations relying on a current notice regarding disaster assistance check here <input type="checkbox"/>		
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2014?	1c	<input checked="" type="checkbox"/>
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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ► 20 , 20 , 20 , 20		
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions.)	2b	
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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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	<input checked="" type="checkbox"/>
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	<input checked="" type="checkbox"/>

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** ☐ Yes ☒ No

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

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

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** ☐ Yes ☒ No

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

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

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? **7b** ☐ Yes ☒ No

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).**

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Andrew Skipper 200 N. Maryland Avenue, #201, Glendale, CA 91206	President 0	0	0	0
Bruce Pomeroy 200 N. Maryland Avenue, #201, Glendale, CA 91206	Secretary 0	0	0	0
Laurie Skipper 200 N. Maryland Avenue, #201, Glendale, CA 91206	Treasurer 0	0	0	0
Julie Alpert 200 N. Maryland Avenue, #201, Glendale, CA 91206	Director 0	0	0	0

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

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

Total number of other employees paid over \$50,000 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	N/A	
2		
3		
4		

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.		Amount
1	N/A	
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	358,024
b	Average of monthly cash balances	1b	15,801
c	Fair market value of all other assets (see instructions)	1c	
d	Total (add lines 1a, b, and c)	1d	373,825
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	373,825
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see instructions)	4	5,607
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	368,218
6	Minimum investment return. Enter 5% of line 5	6	18,411

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	18,411
2a	Tax on investment income for 2014 from Part VI, line 5	2a	190
b	Income tax for 2014. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	190
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	18,221
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	18,221
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	18,221

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	36,621
b	Program-related investments—total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	36,621
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	190
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	36,431

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				18,221
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	2,438			
b From 2010	0			
c From 2011	411			
d From 2012	65			
e From 2013	0			
f Total of lines 3a through e	2,914			
4 Qualifying distributions for 2014 from Part XII, line 4: ▶ \$ 36,621				
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				18,221
e Remaining amount distributed out of corpus	18,400			
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	21,314			
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)	2,438			
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a	18,876			
10 Analysis of line 9:				
a Excess from 2010	0			
b Excess from 2011	411			
c Excess from 2012	65			
d Excess from 2013	0			
e Excess from 2014	18,400			

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 N/A

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

	Tax year	Prior 3 years			(e) Total
	(a) 2014	(b) 2013	(c) 2012	(d) 2011	
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 $\frac{2}{3}$ 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 foundation had \$5,000 or more in assets at any time during the year—see instructions.)

1 Information Regarding Foundation Managers:

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

NONE

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

NONE

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

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

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

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

c Any submission deadlines:

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

Part XV **Supplementary Information** (continued)

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

Recipient		If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)					
a <i>Paid during the year</i>					
SCHEDULE ATTACHED					36,621
Total				3a	36,621
b <i>Approved for future payment</i>					
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			514	10,846	
5	Net rental income or (loss) from real estate:					
a	Debt-financed property					
b	Not debt-financed property					
6	Net rental income or (loss) from personal property					
7	Other investment income					
8	Gain or (loss) from sales of assets other than inventory			514	10,508	
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)				21,354	
13	Total. Add line 12, columns (b), (d), and (e)				21,354	21,354

(See worksheet in line 13 instructions to verify calculations.)

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

[illegible]

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

- | | | | |
|---|--|------------|-------------------------------------|
| 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? | | Yes | No |
| a Transfers from the reporting foundation to a noncharitable exempt organization of: | | | |
| (1) Cash | | | <input checked="" type="checkbox"/> |
| (2) Other assets | | | <input checked="" type="checkbox"/> |
| b Other transactions: | | | |
| (1) Sales of assets to a noncharitable exempt organization | | | <input checked="" type="checkbox"/> |
| (2) Purchases of assets from a noncharitable exempt organization | | | <input checked="" type="checkbox"/> |
| (3) Rental of facilities, equipment, or other assets | | | <input checked="" type="checkbox"/> |
| (4) Reimbursement arrangements | | | <input checked="" type="checkbox"/> |
| (5) Loans or loan guarantees | | | <input checked="" type="checkbox"/> |
| (6) Performance of services or membership or fundraising solicitations | | | <input checked="" type="checkbox"/> |
| c Sharing of facilities, equipment, mailing lists, other assets, or paid employees | | | <input checked="" type="checkbox"/> |
| 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. | | | |

[illegible]

- 2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No
- b** If "Yes," complete the following schedule.

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

**Sign
Here**

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

Karenne Stepper
Signature of officer or trustee

5/7/15
Date

TREASURER
Title

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

**Paid
Preparer
Use Only**

Print/Type preparer's name

Preparer's signature

Date

Check ☐ if self-employed

PTIN

Firm's name ▶

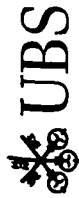
Firm's EIN ►

Firm's address ►

Phone no.

EVERGREEN DEVELOPMENT FOUNDATION
SCHEDULE OF DONATIONS
For Calendar Year Ended December 31, 2014

501(c)(3) Organization	Amount
City of Phoenix 6206 N. 24th Street, Phoenix, AZ 85016	11,000
Grace Church of Sahuarita 2301 E. Sahuarita Road, Sahuarita, AZ 85629	18,525
Arizona Women's Education & Employment, Inc. 640 N. 1st Ave., Phoenix, AZ 85003	500
Broker's For Kids Foundation Matching Donation 8776 E Shea Boulevard, # B3A-535, Scottsdale, AZ 85260	600
PeppedUp, Inc PO Box 50036, Phoenix, AZ 85076	400
EBB Foundation 1544 W Las Palmaritas Drive, Phoenix, AZ 85021	510
Mirada PTO 5500 W. Galveston St., Chandler, AZ 85226	50
Head for the Cure Foundation 2020 Baltimore, #201, Kansas City, MO	750
Valley Partnership 2817 E Camelback Rd., Ste 510, Phoenix, AZ 85016	500
ULI Arizona 5090 N. 40th St. Suite 210, Phoenix, AZ 85018	600
Rio Vista Mission Center 1431 E Southern, Phoenix, AZ 85040	2,280
Sunnyslope Families 245 E. Mountain View Rd., Phoenix, AZ 85020	906
Total	36,621



UBS Financial Services Inc
601 W Riverside Avenue
Suite 1200
Spokane WA 99201-0622

AP23003042435 1214 X13 WH 0

2014 Year End Summary

Account name: EVERGREEN DEVELOPMENT
FOUNDATION

Friendly account name: QGARP Evergreen

Account number: WH 22339 SH

Your Financial Advisor:

SHEA & HARLEY WEALTH CONSULTIN
Phone 509-624-3330/800-824-9212

EVERGREEN DEVELOPMENT
FOUNDATION
200 N MARYLAND AVE
#201
GLENDALE CA 91206-4274

Summary of gains and losses

	Amount (\$)
Short term	304.91

Realized gains and losses

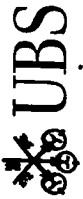
Estimated 2014 gains and losses for transactions with trade dates through 12/31/14 have been incorporated into this statement. Please note that gain or loss recognized on the sale or redemption of certain Structured Products, like Contingent Debt Securities, may be ordinary, and not capital, gain or loss. Please check with your tax advisor. To calculate gains and losses, we liquidate the oldest security lot first. This is known as the first-in, first-out or FIFO accounting method. We use this method unless you specified which tax lot to close when you placed your order. This is known as a versus purchases or VSP order.

Short-term capital gains and losses

Security description	Method	Quantity or face value	Purchase date	Sale date	Sale amount (\$)	Cost basis (\$)	Wash sale cost basis adjustment (\$)	Loss (\$)	Gain (\$)
AMER EXPRESS CO	FIFO	2,000	May 05, 14	Jun 17, 14	189.87	174.06			15.81
AMERIPRISE FINANCIAL INC	FIFO	18,000	May 05, 14	Aug 19, 14	2,196.22	2,021.94			174.28
COCA COLA CO COM	FIFO	51,000	May 05, 14	Nov 17, 14	2,186.33	2,080.65			105.68
DANAHER CORP	FIFO	2,000	May 05, 14	Jun 17, 14	160.49	145.96			14.53

continued next page

See Important information about your statement on the last page of this statement for more information. We may not adjust gains and losses for all capital changes. Cost basis for coupon tax-exempt municipal securities, include securities subject to AMT, has been adjusted for mandatory amortization of bond premium. Estimates in the Unclassified section can not be classified as short term or long term because information is missing, or the product is one in which the gain/loss calculation is not provided.



Portfolio Management Program

Account name: EVERGREEN DEVELOPMENT
Friendly account name: QGARP Evergreen
Account number: WH 22339 SH

Your Financial Advisor:
SHEA & HARLEY WEALTH CONSULTIN
509-624-3330/800-824-9212

Realized gains and losses (continued)

Short-term capital gains and losses (continued)

Security description	Method	Quantity or face value	Purchase date	Sale date	Sale amount (\$)	Cost basis (\$)	Wash sale cost basis adjustment(\$)	Loss (\$)	Gain (\$)
DICK'S SPORTING GOODS INC	FIFO	40 000	May 05, 14	May 22, 14	1,732.96	2,083.20		-350.24	
DU PONT DE NEMOURS	FIFO	31 000	May 05, 14	Dec 16, 14	2,181.10	2,092.19			88.91
ECOLAB INC	FIFO	1 000	May 05, 14	Jun 17, 14	108.19	105.11			3.08
EXPRESS SCRIPTS HLDG CO	FIFO	1 000	May 05, 14	Jun 17, 14	69.98	67.25			2.73
FRANKLIN RESOURCES INC	FIFO	2.000	May 05, 14	Jun 17, 14	112.34	104.86			7.48
HALLIBURTON CO (HOLDING COMPANY)	FIFO	37 000	May 05, 14	Jul 21, 14	2,126.78	1,939.91			186.87
MCKESSON CORP	FIFO	1 000	May 05, 14	Jun 17, 14	67.65	63.96			3.69
MEDTRONIC INC	FIFO	1.000	May 05, 14	Jun 17, 14	184.72	168.01			16.71
STARBUCKS CORP	FIFO	1 000	May 05, 14	Jun 17, 14	61.44	58.88			2.56
VF CORP	FIFO	1 000	May 05, 14	Jun 17, 14	75.34	70.84			4.50
YUM! BRANDS INC	FIFO	34 000	May 05, 14	Jun 17, 14	2,107.27	2,082.16			25.11
Total	FIFO	1 000	May 05, 14	Jun 17, 14	79.38	76.17			3.21
Net short-term capital gains and losses					\$13,640.06	\$13,335.15		-\$350.24	\$655.15
Net capital gains/losses:									\$304.91
									\$304.91



UBS Financial Services Inc
601 W. Riverside Avenue
Suite 1200
Spokane WA 99201-0622

ANQ7001877715 1214 X13 WH 0

2014 Year End Summary

Account name: EVERGREEN DEVELOPMENT
FOUNDATION

Friendly account name: 60/40 Evergreen

Account number: WH 08638 SH

Your Financial Advisor:

SHEA & HARLEY WEALTH CONSULTIN
Phone 509-624-3330/800-824-9212

EVERGREEN DEVELOPMENT
FOUNDATION
2390 E CAMELBACK ROAD
SUITE 410
PHOENIX AZ 85016-3479

Summary of gains and losses

	Amount (\$)
Short term	159.25
Long term	10,044.15
Total	\$10,203.40

Realized gains and losses

Estimated 2014 gains and losses for transactions with trade dates through 12/31/14 have been incorporated into this statement. Please note that gain or loss recognized on the sale or redemption of certain Structured Products, like Contingent Debt Securities, may be ordinary, and not capital, gain or loss. Please check with your tax advisor. To calculate gains and losses, we liquidate the oldest security lot first. This is known as the first-in, first-out or FIFO accounting method. We use this method unless you specified which tax lot to close when you placed your order. This is known as a versus purchases or VSP order.

Short-term capital gains and losses

Security description	Method	Quantity or face value	Purchase date	Sale date	Sale amount (\$)	Cost basis (\$)	Wash sale cost basis adjustment (\$)	Loss (\$)	Gain (\$)
ISHARES 1-3 YEAR CREDIT BOND ETF	FIFO	210 000	Jul 08, 13	Apr 23, 14	22,145.94	21,991.20			154.74

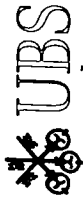
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Member SIPC

ANQ70005001877715 NQ7000229801 00002 1214 000000000 WH08638SH0 101000

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Portfolio Management Program

Account name: EVERGREEN DEVELOPMENT
Friendly account name: 60/40 Evergreen
Account number: WH 08638 SH

Your Financial Advisor:
SHEA & HARLEY WEALTH CONSULTING
509-624-3330/800-824-9212

Realized gains and losses (continued)

Short-term capital gains and losses (continued)

Security description	Method	Quantity or face value	Purchase date	Sale date	Sale amount (\$)	Cost basis (\$)	Wash sale cost basis adjustment(\$)	Loss (\$)	Gain (\$)
VANGUARD SHORT TERM CORPORATE BD ETF	FIFO	5 000	Sep 06, 13	Mar 28, 14	399.35	394.84			4.51
Total					\$22,545.29	\$22,386.04			\$159.25
Net short-term capital gains and losses									
\$159.25									

Long-term capital gains and losses

Security description	Method	Quantity or face value	Purchase date	Sale date	Sale amount (\$)	Cost basis (\$)	Wash sale cost basis adjustment(\$)	Loss (\$)	Gain (\$)
AMERICAN FUNDS AMERICAN BALANCED F-1	FIFO	50 642	Oct 20, 10	Mar 28, 14	1,240.73	875.60			365.13
AMERICAN FUNDS CAPITAL WORLD G/1 F-1	FIFO	76 164	Sep 25, 12	Mar 28, 14	3,457.08	2,754.85			702.23
AMERICAN FUNDS CAPITAL INC BLDG F-1	FIFO	45 137	Oct 20, 10	Mar 28, 14	2,638.68	2,258.20			380.48
AMERICAN FUNDS INC FUND OF AMER F-1	FIFO	424 552	Oct 20, 10	Mar 28, 14	8,860.39	6,954.16			1,906.23
	FIFO	1,184 330	Oct 20, 10	Apr 23, 14	25,036.74	19,399.33			5,637.41
LORD ABBETT FLOATING RATE FUND A	FIFO	208 057	Mar 17, 11	Mar 28, 14	1,974.46	1,945.33			29.13
	FIFO	2,331.052	Mar 17, 11	Apr 23, 14	22,051.75	21,795.34			256.41
LORD ABBETT SHORT DURATION INCOME FUND CLASS A	FIFO	209 268	Mar 17, 11	Mar 28, 14	952.17	962.64		-10.47	
	FIFO	3,744 201	Mar 17, 11	Apr 23, 14	17,036.11	17,223.32		-187.21	
	FIFO	9 357	Mar 31, 11	Apr 23, 14	42.58	43.04		-0.46	
	FIFO	28,885	Apr 29, 11	Apr 23, 14	131.43	133.45		-2.02	
	FIFO	28 927	May 31, 11	Apr 23, 14	131.61	133.93		-2.32	
	FIFO	30 541	Jun 30, 11	Apr 23, 14	138.97	140.49		-1.52	
	FIFO	30 338	Jul 29, 11	Apr 23, 14	138.03	139.86		-1.83	
	FIFO	31 182	Aug 31, 11	Apr 23, 14	141.88	141.88			
	FIFO	31 670	Sep 30, 11	Apr 23, 14	144.10	142.83			
	FIFO	31,257	Oct 31, 11	Apr 23, 14	142.22	142.22			
									1 27

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Portfolio Management Program

Account name: EVERGREEN DEVELOPMENT
Friendly account name: 60/40 Evergreen
Account number: WH 08638 SH

Your Financial Advisor:
SHEA & HARLEY WEALTH CONSULTING
509-624-3330/800-824-9212

Realized gains and losses (continued)

Long-term capital gains and losses (continued)

Security description	Method	Quantity or face value	Purchase date	Sale date	Sale amount (\$)	Cost basis (\$)	Wash sale cost basis adjustment (\$)	Loss (\$)	Gain (\$)
	FIFO	31 938	Nov 30, 11	Apr 23, 14	145 32	144 68			0 64
	FIFO	31 454	Dec 30, 11	Apr 23, 14	143 11	142 80			0 31
	Adjustment	30 926	Jan 31, 12	Apr 23, 14	140 72	140 72	-0 92		
	Adjustment	30 785	Feb 29, 12	Apr 23, 14	140 07	140 46	-1 15	-0 39	
	FIFO	29 802	Mar 30, 12	Apr 23, 14	135 60	137 09		-1 49	
	FIFO	29 217	Apr 30, 12	Apr 23, 14	132 93	134 40		-1 47	
	FIFO	727 821	May 23, 12	Apr 23, 14	3,311 59	3,326 14		-14 55	
WISDOMTREE TRUST DIVID EX FINANCIALS FUND	FIFO	41 000	Oct 20, 10	Mar 28, 14	2,858 19	1,869 55			988 64
Total					\$91,266.46	\$81,222.31		-\$223.73	\$10,267.88
Net long-term capital gains or losses									\$10,044.15
Net capital gains/losses:									\$10,203.40