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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.

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 THE TRUDY FOUNDATION		A Employer identification number 20-6389901	
% JULIA A MURPHY		B Telephone number (see instructions) (816) 241-4198	
Number and street (or P O box number if mail is not delivered to street address) 301 BELLEFONTAINE 1 NORTH		Room/suite	
City or town, state or province, country, and ZIP or foreign postal code KANSAS CITY, MO 64124		C If exemption application is pending, check here <input type="checkbox"/>	
G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change		<input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change	
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		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"/>	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 1,964,747		J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)	
F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>			

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	0			
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities.	43,150	43,150		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	191,646			
	b Gross sales price for all assets on line 6a 478,368				
	7 Capital gain net income (from Part IV, line 2) . . .		191,646		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	234,796	234,796		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	4,870			4,870
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	4,160	416		3,744
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions) . . .	3,056	566		
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	28,749	28,749		
	24 Total operating and administrative expenses. Add lines 13 through 23	40,835	29,731		8,614
	25 Contributions, gifts, grants paid	99,220			99,220
	26 Total expenses and disbursements. Add lines 24 and 25	140,055	29,731		107,834
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	94,741			
	b Net investment income (if negative, enter -0-)		205,065		
	c Adjusted net income (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	27,689	56,895	56,895
	2	Savings and temporary cash investments	120,117	106,187	106,187
	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)	50,001	 41,502	41,567
	b	Investments—corporate stock (attach schedule)	378,711	 537,173	463,702
	c	Investments—corporate bonds (attach schedule).	207,541	 101,366	101,317
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	884,307	 921,471	1,195,079
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15	Other assets (describe ▶ _____)	 1,487	 0	 0	
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	1,669,853	1,764,594	1,964,747	
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)		0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	1,669,853	1,764,594	
	30	Total net assets or fund balances (see instructions)	1,669,853	1,764,594	
	31	Total liabilities and net assets/fund balances (see instructions)	1,669,853	1,764,594	

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)	11,669,853
2	Enter amount from Part I, line 27a	294,741
3	Other increases not included in line 2 (itemize) ▶ _____	3
4	Add lines 1, 2, and 3	41,764,594
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	61,764,594

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)
1 a	UMB BANK NEX-004612	P		
b	UMB NEX-009253	P		
c	UMB NEX-009253	P		
d	UMB BANK NEX-004612	P	2014-02-12	2014-11-25
e	CAPITAL GAIN DIVIDENDS	P		

(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 154,635		150,692	3,943
b 4,777		4,927	-150
c 116,683		121,045	-4,362
d 10,058		10,058	0
e			4,966

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

(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	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a			3,943
b			-150
c			-4,362
d			0
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	191,646
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	117,690	2,097,658	0 056105
2012	98,500	1,891,041	0 052088
2011	88,765	1,805,303	0 049169
2010	158,328	1,961,662	0 080711
2009	118,364	1,946,949	0 060795

2	Total of line 1, column (d).	2	0 298868
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 059774
4	Enter the net value of noncharitable-use assets for 2014 from Part X, line 5.	4	2,003,187
5	Multiply line 4 by line 3.	5	119,738
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	2,051
7	Add lines 5 and 6.	7	121,789
8	Enter qualifying distributions from Part XII, line 4.	8	107,834

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			
b		Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b		14,101	
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.		34,101	
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-		54,101	
6		Credits/Payments			
a		2014 estimated tax payments and 2013 overpayment credited to 2014		6a	1,236
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.		71,236	
8		Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached.		827	
9		Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		92,892	
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-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? <input type="checkbox"/>		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 type="checkbox"/> \$ 0 (2) On foundation managers <input 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 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 <input type="checkbox"/>		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. <input 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?		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 type="checkbox"/> MO				
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 JULIA A MURPHY Telephone no (816) 377-5857 Located at 301 BELLEFONTAINE 1-N KANSAS CITY MO ZIP +4 64124			
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 Yes No			
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

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
See Additional Data Table				

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

Total

number of other employees paid over \$50,000.

Form 990-PF (2014)

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
Total number of others receiving over \$50,000 for professional services.		

Part IX-A

Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1	
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see instructions)

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

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	608,459
b	Average of monthly cash balances.	1b	230,154
c	Fair market value of all other assets (see instructions).	1c	1,195,079
d	Total (add lines 1a, b, and c).	1d	2,033,692
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	0
3	Subtract line 2 from line 1d.	3	2,033,692
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	30,505
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	2,003,187
6	Minimum investment return. Enter 5% of line 5.	6	100,159

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	100,159
2a	Tax on investment income for 2014 from Part VI, line 5.	2a	4,101
b	Income tax for 2014 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	4,101
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	96,058
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	96,058
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	96,058

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	107,834
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	0
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	0
b	Cash distribution test (attach the required schedule).	3b	0
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	107,834
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	
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	107,834
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			
2		Undistributed income, if any, as of the end of 2014			
a		Enter amount for 2013 only. 0			
b		Total for prior years 2012 , 2011 , 2010 0			
3		Excess distributions carryover, if any, to 2014			
a		From 2009. 0			
b		From 2010. 32,001			
c		From 2011. 125			
d		From 2012. 4,822			
e		From 2013. 14,041			
f		Total of lines 3a through e. 50,989			
4		Qualifying distributions for 2014 from Part XII, line 4 ▶ \$ 107,834			
a		Applied to 2013, but not more than line 2a 0			
b		Applied to undistributed income of prior years (Election required—see instructions).			
c		Treated as distributions out of corpus (Election required—see instructions).			
d		Applied to 2014 distributable amount. 96,058			
e		Remaining amount distributed out of corpus 11,776			
5		Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a).)			
6		Enter the net total of each column as indicated below:			
a		Corpus Add lines 3f, 4c, and 4e Subtract line 5 62,765			
b		Prior years' undistributed income Subtract line 4b from line 2b. 0			
c		Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.			
d		Subtract line 6c from line 6b Taxable amount—see instructions 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)			
8		Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions) . . . 0			
9		Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a 62,765			
10		Analysis of line 9			
a		Excess from 2010. . . . 32,001			
b		Excess from 2011. . . . 125			
c		Excess from 2012. . . . 4,822			
d		Excess from 2013. . . . 14,041			
e		Excess from 2014. . . . 11,776			

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

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

1 Information Regarding Foundation Managers:

■ 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

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

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

Form **990-PF** (2014)

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2014)

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.		1a(1)		No
(2) Other assets.		1a(2)		No
b Other transactions				
(1) Sales of assets to a noncharitable exempt organization.		1b(1)		No
(2) Purchases of assets from a noncharitable exempt organization.		1b(2)		No
(3) Rental of facilities, equipment, or other assets.		1b(3)		No
(4) Reimbursement arrangements.		1b(4)		No
(5) Loans or loan guarantees.		1b(5)		No
(6) Performance of services or membership or fundraising solicitations.		1b(6)		No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.		1c		No
d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received				

[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

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.

Sign Here	*****	2015-11-16	*****	May the IRS discuss this return with the preparer shown below (see instr)? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
	Signature of officer or trustee	Date	Title	

Paid Preparer Use Only	Print/Type preparer's name Michael J Engle	Preparer's Signature	Date	Check if self-employed <input checked="" type="checkbox"/>	PTIN P00482834
	Firm's name <input checked="" type="checkbox"/> BKD LLP			Firm's EIN <input checked="" type="checkbox"/>	
	Firm's address <input checked="" type="checkbox"/> 1201 Walnut Suite 1700 Kansas City, MO 641062246			Phone no (816) 221-6300	

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(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
ROBERTA MURPHY	TRUSTEE, CHAIR 1 0	0	0	0
301 BELLEFONTAINE 1 NORTH KANSAS CITY,MO 64124				
JULIA MURPHY	TRUSTEE, ADMINISTRATOR 1 0	4,870	0	0
301 BELLEFONTAINE 1 NORTH KANSAS CITY,MO 64124				
CATHERINE LOBASH	TRUSTEE, ACCOUNTANT 1 0	0	0	0
301 BELLEFONTAINE 1 NORTH KANSAS CITY,MO 64124				
SUSAN MEEHAN	TRUSTEE, ATTORNEY 1 0	0	0	0
301 BELLEFONTAINE 1 NORTH KANSAS CITY,MO 64124				
ARTHUR MURPHY III	TRUSTEE 1 0	0	0	0
301 BELLEFONTAINE 1 NORTH KANSAS CITY,MO 64124				

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2014 Depreciation Schedule

Name: THE TRUDY FOUNDATION

EIN: 20-6389901

**TY 2014 Investments Corporate
Bonds Schedule**

Name: THE TRUDY FOUNDATION

EIN: 20-6389901

Name of Bond	End of Year Book Value	End of Year Fair Market Value
UMB CORPORATE BONDS	101,366	101,317

**TY 2014 Investments Corporate
Stock Schedule****Name:** THE TRUDY FOUNDATION**EIN:** 20-6389901

Name of Stock	End of Year Book Value	End of Year Fair Market Value
CITIGROUP STOCK	106,898	12,175
KAYNE ANDERSON MLP INVT CO	68,111	93,541
TORTOISE ENERGY INFRASTRUCTURE	22,536	25,824
TCW EMERGING MARKETS LOCAL		
TCW EMERGING MARKETS INCOME	48,353	46,205
TEMPLETON GLOBAL BOND ADVISOR	58,546	53,292
OPPENHEIMER SENIOR FLOATING RA		
FPA CRESCENT INSTL	156,359	157,476
LORD ABBOT SHORT DURATION INC	76,370	75,189

**TY 2014 Investments Government
Obligations Schedule****Name:** THE TRUDY FOUNDATION**EIN:** 20-6389901**US Government Securities - End of
Year Book Value:**

41,502

**US Government Securities - End of
Year Fair Market Value:**

41,567

**State & Local Government
Securities - End of Year Book
Value:****State & Local Government
Securities - End of Year Fair
Market Value:**

TY 2014 Investments - Other Schedule

Name: THE TRUDY FOUNDATION

EIN: 20-6389901

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
PCM SELECT MANAGERS FUND LP	AT COST	921,471	1,195,079

TY 2014 Other Assets Schedule

Name: THE TRUDY FOUNDATION

EIN: 20-6389901

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
OID RECEIVABLE	1,487	0	0

TY 2014 Other Expenses Schedule**Name:** THE TRUDY FOUNDATION**EIN:** 20-6389901

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PCM INVESTMENT EXPENSES	18,642	18,642		
INVESTMENT EXPENSES	10,054	10,054		
BANK FEES	12	12		
POSTAGE	41	41		

TY 2014 Other Income Schedule

Name: THE TRUDY FOUNDATION

EIN: 20-6389901

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
PCM SELECT MANAGERS FUND			
TAX REFUNDS			

TY 2014 Taxes Schedule**Name:** THE TRUDY FOUNDATION**EIN:** 20-6389901

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES	566	566		
EXCISE TAXES ON INVESTMENT INC	2,490			

Trudy Foundation 2014 Grant Awards

1 of 2

Organization	Address	City	State	Zip	EIN	Purpose	Status	2014 Awards
Alzheimer's Association	225 N. Michigan Ave., Floor 17	Chicago	IL	60601-7633	13-3039601	Research	PC	\$10,000
Ballet Austin	501 W. 3rd Street	Austin	TX	78701	74-6060386	Operating Support	PC	\$1,000
Brother's Brother Foundation	1200 Galveston Avenue	Pittsburgh	PA	15233	34-6562544	Operating Support	PC	\$3,000
Charity Water	200 Varick Street, Suite 201	New York	NY	10014	22-3936753	Operating Support	PC	\$3,000
City Union Mission	1100 E. 11th Street	Kansas City	MO	64106	44-6005481	Operating Support	PC	\$10,000
Community Services League	404 N. Noland Road	Independence	MO	64050	43-0976396	Operating Support	PC	\$1,000
Doctors Without Borders USA Inc.	333 7th Avenue, 2nd Floor	New York	NY	10001-5004	13-3433452	Operating Support	PC	\$3,000
Eleos Ministries	3401 Independence Avenue	Kansas City	MO	64124	27-5299366	Operating Support	PC	\$11,000
Eleos Ministries	3401 Independence Avenue	Kansas City	MO	64124	27-5299366	To support Eleos Detroit	PC	\$1,000
Excelsior Springs High School Robotics	612 Tiger Drive	Excelsior Springs	MO	64204	Public School	Robotics Program	PC	\$6,500
Excelsior Springs High School Science Olympiad Team	612 Tiger Drive	Excelsior Springs	MO	64204	Public School	Science Olympiad Team	PC	\$1,500
First United Methodist Church - Excelsior Springs	1650 Rainbow Blvd.	Excelsior Springs	MO	64204	Church	Operating Support	PC	\$2,000
Heart of America Council, Boy Scouts of America	10210 Holmes Road	Kansas City	MO	64131-4212	22-1576300	Operating Support	PC	\$2,500
Heart of America Council, Boy Scouts of America	10210 Holmes Road	Kansas City	MO	64131-4212	22-1576300	To support Bartle Camp	PC	\$2,500
Heifer International	1 World Avenue	Little Rock	AR	72202	35-1019477	Operating Support	PC	\$1,720

Trudy Foundation 20-6389901

Trudy Foundation 2014 Grant Awards

2 of 2

Hillcrest Ministries	401 North Spring St.	Independence	MO	64051	43-1836391	Independence Housing Site	PC	\$2,000
Hunger Project	5 Union Square West, 7th Floor	New York	NY	10003	94-2443282	Operating Support	PC	\$6,000
Kansas City Ballet	500 W. Pershing Road	Kansas City	MO	64108-2430	74-2867681	Operating Support	PC	\$1,000
Long Center for the Performing Arts	701 W. Riverside Drive	Austin	TX	78704	74-2867681	Operating Support	PC	\$1,000
Lynic Opera	1725 Holmes Street	Kansas City	MO	64108	44-0626124	Operating Support	PC	\$1,000
March of Dimes, Birth Defects Foundation, Austn Division, Texas Chapter	11044 Research Blvd., Suite A-210	Austin	TX	78759	13-1846366	Operating Support	PC	\$3,000
National Parks Conservation Association	777 6th Street NW, Suite 700	Washington	DC	20001-3723	53-0225165	Operating Support	PC	\$3,000
Nature Conservancy	4245 North Fairfax Drive, Suite 100	Arlington	VA	22203-1606	53-0242652	Operating Support	PC	\$3,000
Puppetry Arts Institute	11025 East Winner Road	Independence	MO	64052	43-1891966	Operating Support	PC	\$3,000
St. Jude's Children's Research Hospital	501 St Jude Place	Memphis, TN	TN	38105	62-0646012	Operating Support	PC	\$1,000
Smile Train	P.O. Box 96231	Washington	DC	20090-6231	13-3661416	Operating Support	PC	\$2,000
Starlight Theatre	4600 Starlight Road	Kansas City	MO	64132-2032	44-0552079	Operating Support	PC	\$2,500
Tabitha's Closet	125 South Pleasant	Independence	MO	64050	Church	Operating Support	PC	\$1,000
Texas Hearing & Service Dogs	4803 Rutherglen	Austin	TX	78749	76-0260567	Operating Support	PC	\$3,000
Trail Foundation	P.O. Box 5195	Austin	TX	78763	87-0699956	Operating Support	PC	\$3,000
Wounded Warrior Project	12672 Silicon Drive, Suite 105	San Antonio	TX	78249	27-2054018	Operating Support	PC	\$4,000
TOTAL								\$99,220

7/30/2015

2014 Grant List - BKD