



See a Social Security Number? Say Something!
Report Privacy Problems to <https://public.resource.org/privacy>
Or call the IRS Identity Theft Hotline at 1-800-908-4490



▶ 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 WHITAKER FOUNDATION		A Employer identification number 23-7301744	
% WILLIAM WHITAKER		B Telephone number (see instructions)	
Number and street (or P O box number if mail is not delivered to street address) PO BOX 996 Suite	Room/suite		
City or town, state or province, country, and ZIP or foreign postal code SNOQUALMIE, WA 98065		C If exemption application is pending, check here <input type="checkbox"/>	
G Check all that apply <div style="display: flex; justify-content: space-between;"> <div> <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change </div> <div> <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change </div> </div>		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 2,554,194	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"/>	

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))

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 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.	53,024	53,024	0		
	5a	Gross rents					
	b	Net rental income or (loss) _____					
	6a	Net gain or (loss) from sale of assets not on line 10 _____	13,689				
	b	Gross sales price for all assets on line 6a _____ 25,393					
	7	Capital gain net income (from Part IV, line 2)		13,689			
	8	Net short-term capital gain					
	9	Income modifications					
	10a	Gross sales less returns and allowances					
	b	Less Cost of goods sold					
c	Gross profit or (loss) (attach schedule)						
11	Other income (attach schedule)	15,363	15,363	0			
12	Total. Add lines 1 through 11	82,076	82,076	0			
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	840	420	0		420
	14	Other employee salaries and wages					
	15	Pension plans, employee benefits					
	16a	Legal fees (attach schedule)					
	b	Accounting fees (attach schedule)	4,600	920	0		3,680
	c	Other professional fees (attach schedule)					
	17	Interest					
	18	Taxes (attach schedule) (see instructions)	784	0	0		0
	19	Depreciation (attach schedule) and depletion . . .					
	20	Occupancy	6,537	0	0		6,537
	21	Travel, conferences, and meetings					
	22	Printing and publications					
	23	Other expenses (attach schedule)	464	0	0		464
	24	Total operating and administrative expenses. Add lines 13 through 23	13,225	1,340	0		11,101
	25	Contributions, gifts, grants paid	126,000				126,000
	26	Total expenses and disbursements. Add lines 24 and 25	139,225	1,340	0		137,101
	27	Subtract line 26 from line 12					
	a	Excess of revenue over expenses and disbursements	-57,149				
	b	Net investment income (if negative, enter -0-)		80,736			
	c	Adjusted net income (if negative, enter -0-)			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			
	2	Savings and temporary cash investments	145,796	54,218	54,218
	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)	179,337 <input checked="" type="checkbox"/>	179,337	367,367
	c	Investments—corporate bonds (attach schedule).	840,100 <input checked="" type="checkbox"/>	840,100	862,710
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	787,991 <input checked="" type="checkbox"/>	822,420	1,269,899
	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)	1,953,224	1,896,075	2,554,194	
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	1,953,224	1,896,075	
	30	Total net assets or fund balances (see instructions)	1,953,224	1,896,075	
31	Total liabilities and net assets/fund balances (see instructions) . . .	1,953,224	1,896,075		

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 1,953,224
2	Enter amount from Part I, line 27a	2 -57,149
3	Other increases not included in line 2 (itemize) ▶ _____	3
4	Add lines 1, 2, and 3	4 1,896,075
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 1,896,075

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	LONG TERM STOCK SALE	P	2013-01-01	2014-12-31
b	CAPITAL GAIN DIVIDENDS	P		
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 20,291		11,704	8,587
b			5,102
c			
d			
e			

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			8,587
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	13,689
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8	}	3	

Part V

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2013	134,907	2,376,045	0 056778
2012	119,594	2,199,057	0 054384
2011	82,000	2,252,945	0 036397
2010	111,228	2,189,523	0 0508
2009	98,530	1,966,144	0 050113

2	Total of line 1, column (d).	2	0 248472
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 049694
4	Enter the net value of noncharitable-use assets for 2014 from Part X, line 5.	4	2,562,432
5	Multiply line 4 by line 3.	5	127,337
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	807
7	Add lines 5 and 6.	7	128,144
8	Enter qualifying distributions from Part XII, line 4.	8	137,101

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

Part VI

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

1a	Exempt operating foundations described in section 4940(d)(2), check here <input 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	807
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	807
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	807
6	Credits/Payments		
a	2014 estimated tax payments and 2013 overpayment credited to 2014	6a	720
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	720
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	87
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 <input type="checkbox"/> Refunded <input type="checkbox"/>	11	

Part VII-A

Statements 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)? <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>	1b		No
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"/> \$ _____ (2) On foundation managers <input type="checkbox"/> \$ _____			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ _____			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes.</i> <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? <i>If "Yes," attach the statement required by General Instruction T.</i> <input type="checkbox"/>	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV.</i>	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions): <input type="checkbox"/> WA			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation.</i>	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>	9		No
10	Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>	10		No

Part VII-A

Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address N/A				
14	The books are in care of WILLIAM WHITAKER Telephone no (425) 392-7583 Located at PO BOX 996 SNOQUALMIE WA ZIP+4 98065			
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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here.	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 <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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?. <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		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2014?	4b		No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a	During the year did the foundation pay or incur any amount to			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
	(4) Provide a grant to an organization other than a charitable, etc , organization described in section 4945(d)(4)(A)? (see instructions).	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?	5b		No
	Organizations relying on a current notice regarding disaster assistance check here.			
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?			
	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?			
		<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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?			
		<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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
WILLIAM WHITAKER	PRES /VICE PRES	0	0	0
PO BOX 996	4 0			
SNOQUALMIE,WA 98065				
CHERYL MATHENY	SECRETARY	840	0	0
PO BOX 996	2 0			
SNOQUALMIE,WA 98065				
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.				

Part VIII

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

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

Part IX-A

Expenses

1

Part IX-B

Amount

1 NONE

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	2,485,216
b	Average of monthly cash balances.	1b	116,238
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	2,601,454
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	2,601,454
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	39,022
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	2,562,432
6	Minimum investment return. Enter 5% of line 5.	6	128,122

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	128,122
2a	Tax on investment income for 2014 from Part VI, line 5.	2a	807
b	Income tax for 2014 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	807
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	127,315
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	127,315
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	127,315

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	137,101
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	137,101
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	807
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	136,294

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. 1,386			
b		From 2010. 4,696			
c		From 2011.			
d		From 2012. 10,769			
e		From 2013. 16,101			
f		Total of lines 3a through e. 32,952			
4		Qualifying distributions for 2014 from Part XII, line 4 ▶ \$ 137,101			
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. 127,315			
e		Remaining amount distributed out of corpus 9,786			
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 42,738			
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) . . . 1,386			
9		Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a 41,352			
10		Analysis of line 9			
a		Excess from 2010. . . . 4,696			
b		Excess from 2011. . . .			
c		Excess from 2012. . . . 10,769			
d		Excess from 2013. . . . 16,101			
e		Excess from 2014. . . . 9,786			

Part XIV

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

1a

If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2014, enter the date of the ruling.

b

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

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed.	Tax year	Prior 3 years			(e) Total
		(a) 2014	(b) 2013	(c) 2012	(d) 2011	
b	85% of line 2a					
c	Qualifying distributions from Part XII, line 4 for each year listed.					
d	Amounts included in line 2c not used directly for active conduct of exempt activities.					
e	Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c.					
3	Complete 3a, b, or c for the alternative test relied upon					
a	"Assets" alternative test—enter					
	(1) Value of all assets					
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b	"Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.					
c	"Support" alternative test—enter					
	(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties).					
	(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
	(3) Largest amount of support from an exempt organization					
	(4) Gross investment income					

Part XV

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

1

Information Regarding Foundation Managers:

a

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

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

NA

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

WILLIAM WHITAKER
PO BOX 996
SNOQUALMIE,WA 98065
(425) 392-7583

b

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

APPLICATIONS MUST BE SUBMITTED IN WRITING AND MUST INCLUDE DESCRIPTION OF THE PROGRAM OR PROJECT FOR WHICH AN AWARD IS REQUESTED

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

GIFTS ARE MADE TO ORGANIZATIONS EXEMPT FROM TAX UNDER IRC 501(C)(3), ALSO TO STATE AND LOCAL INSTITUTIONS DESCRIBED IN IRC 170(C)(1)

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

[illegible]

TY 2014 Accounting Fees Schedule

Name: WHITAKER FOUNDATION

EIN: 23-7301744

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES - BADER MARTIN	4,600	920	0	3,680

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

TY 2014 Depreciation Schedule

Name: WHITAKER FOUNDATION

EIN: 23-7301744

**TY 2014 Investments Corporate
Bonds Schedule**

Name: WHITAKER FOUNDATION

EIN: 23-7301744

Name of Bond	End of Year Book Value	End of Year Fair Market Value
BOND FUNDS	840,100	862,710

**TY 2014 Investments Corporate
Stock Schedule**

Name: WHITAKER FOUNDATION

EIN: 23-7301744

Name of Stock	End of Year Book Value	End of Year Fair Market Value
MUTUAL FUNDS	179,337	367,367

TY 2014 Investments - Other Schedule

Name: WHITAKER FOUNDATION

EIN: 23-7301744

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
ISHARES & EXCH TRADED FUNDS		805,931	1,269,899
K-1 INVESTMENTS		16,489	0

TY 2014 Other Expenses Schedule**Name:** WHITAKER FOUNDATION**EIN:** 23-7301744

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
OFFICE SUPPLIES	75	0	0	75
STATE REGISTRATION & FILING	35	0	0	35
INSURANCE	134	0	0	134
LANDSCAPING	140	0	0	140
BANK FEES	80	0	0	80

TY 2014 Other Income Schedule

Name: WHITAKER FOUNDATION

EIN: 23-7301744

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
TWO LOUISVILLE ASSOCIATES K-1	15,379	15,379	0
REAL ESTATE ASSOCIATES K-1	-16	-16	0

TY 2014 Taxes Schedule

Name: WHITAKER FOUNDATION

EIN: 23-7301744

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXCISE TAXES	784	0	0	0

WHITAKER FOUNDATION
EIN 23-7301744
2014 FORM 990-PF
ATTACHMENT A
Page 1 of 3

Name	Address	Amount
Admiral Nimitz Foundation South Pacific Memorial	P O Box 1188 Fredericksburg, TX 78624-1188	100
Alliance for the Separation of Schools & State	1071 N Fulton St , Fresno, CA 93728	100
Alzheimers Assoc of WA	100 W Harrison N Tower, Seattle, WA 98119	250
Alzheimers Assoc of WA	100 W Harrison N Tower, Seattle, WA 98119	250
American Cancer Society	P O Box 19170, Seattle, WA 98109-1170	250
American Cancer Society	P O Box 19170, Seattle, WA 98109-1170	250
American Leprosy Mission	1 Alm Way, Greenville, SC 29601-3060	250
American Leprosy Mission	1 Alm Way, Greenville, SC 29601-3060	250
Americans United for Life	655 15th St NW Ste 410, Washington, DC 20005	1,000
Americans United for Life	655 15th St NW Ste 410, Washington, DC 20005	1,000
Americares	88 Hamilton Ave, Stamford, CT 06902-3100	250
Americares	88 Hamilton Ave, Stamford, CT 06902-3100	250
Arthritis Foundation	115 NE 100th St Ste 350, Seattle, WA 98125-8013	250
Arthritis Foundation	115 NE 100th St Ste 350, Seattle, WA 98125-8013	250
Ave Maria University	5050 Ave Maria Blvd, Ave Maria, FL 34142-9505	250
Ave Maria University	5050 Ave Maria Blvd, Ave Maria, FL 34142-9505	250
Bill of Rights Institute	200 N Glebe Rd Ste 1050, Arlington, VA 22203-3754	100
Bill of Rights Institute	200 N Glebe Rd Ste 1050, Arlington, VA 22203-3754	100
Burn(ed) Children Recovery Foundation	P O Box 3231, Everett, WA 98203	250
Burn(ed) Children Recovery Foundation	P O Box 3231, Everett, WA 98203	100
Carmelite Institute of Spirituality	P O Box 1386, Stanwood, WA 98292-1386	100
Carmelite Institute of Spirituality	P O Box 1386, Stanwood, WA 98292-1386	100
Catholic Bishop of N Alaska	1312 Peger Rd, Fairbanks, AK 99709-5168	250
Catholic Bishop of N Alaska	1312 Peger Rd, Fairbanks, AK 99709-5168	250
Catholic Community Service	700 108th Ave NE Ste 211, Bellevue, WA 98004-5134	2,000
Catholic Community Service	700 108th Ave NE Ste 211, Bellevue, WA 98004-5134	2,000
Catholic League	450 7th Ave Flr 34, New York, NY 10117-0001	250
Catholic League	450 7th Ave Flr 34, New York, NY 10117-0001	250
Catholic Relief Services	228 W Lexington Svcs, Baltimore, MD 21201	2,000
Catholic Relief Services	228 W Lexington Svcs, Baltimore, MD 21201	2,000
Children's Home Society	PO Box 15190, Seattle, A 98115-0190	100
Children's Home Society	PO Box 15190, Seattle, A 98115-0190	100
Court Advocates for Children Kittitas County	421 Pearl #208, Ellensburg, WA 98926	100
Court Advocates for Children Kittitas County	421 Pearl #208, Ellensburg, WA 98926	100
Covenant House - Times Square Station	PO Box 731, New York, NY 10108-0900	500
Covenant House - Times Square Station	PO Box 731, New York, NY 10108-0900	250
Cretin-Durham Hall	550 Albert St S, St Paul, MN 55116-1699	100
Eastside Catholic Foundation	232 228th Ave SE, Sammamish, WA 98074-7207	500
Eastside Catholic Foundation	232 228th Ave SE, Sammamish, WA 98074-7207	250
Encompass	1407 Boalch Ave NW, North Bend, WA 98045-7994	1,000
Encompass	1407 Boalch Ave NW, North Bend, WA 98045-7994	1,000
Evergreen Freedom Foundation - Bob Williams	PO Box 552, Olympia, WA 98507	100
Evergreen Freedom Foundation - Bob Williams	PO Box 552, Olympia, WA 98507	250
Faith In Action - Eastside Friends of Seniors	1121 228th Ave SE, Sammamish, WA 98075	1,000
Faith In Action - Eastside Friends of Seniors	1121 228th Ave SE, Sammamish, WA 98075	1,000
Forest Ridge	4800 139th Ave SE, Bellevue, WA 98006-3015	100
Fred Hutchinsen Cancer Inst	1100 Fairview Ave N #LY120, Seattle, WA 98109-4433	250
Fred Hutchinsen Cancer Inst	1100 Fairview Ave N #LY120, Seattle, WA 98109-4433	250
Friedman Foundation	One American Square Ste 2420, Indianapolis, IN 46282	250
Friedman Foundation	One American Square Ste 2420, Indianapolis, IN 46282	250
Friend To Friend	PO Box 98766, Seattle, WA 98198-0766	100
Friend To Friend	PO Box 98766, Seattle, WA 98198-0766	100
Friends of Carpenter Memorial Library	302 Penn Ave, CleElum, WA 98922	100
Friends of the Orphans	1800 112th Ave NE Ste 308-E, Bellevue, WA 98004-2938	250

WHITAKER FOUNDATION
EIN 23-7301744
2014 FORM 990-PF
ATTACHMENT A
Page 2 of 3

Friends of the Orphans	1800 112th Ave NE Ste 308-E, Bellevue, WA 98004-2938	250
Friends of Youth	PO Box 1553, Snoqualmie, WA 98065	250
Friends of Youth	PO Box 1553, Snoqualmie, WA 98065	250
Haiti Art - Healing Art Missions	PO Box 645, 494 N Granger St, Granville, OH 43023	250
Haiti Art - Healing Art Missions	PO Box 645, 494 N Granger St, Granville, OH 43023	250
Harborview Medical Center	PO Box 358220, Seattle, WA 98195-8220	250
Harborview Medical Center	PO Box 358220, Seattle, WA 98195-8220	250
Heritage Foundation	PO Box 97057, 214 Massachusetts Ave NE, Washington, DC 2002	250
Heritage Foundation	PO Box 97057, 214 Massachusetts Ave NE, Washington, DC 2002	250
Hillsdale College	33 E College St, Hillsdale, MI 49242-1298	250
Hillsdale College	33 E College St, Hillsdale, MI 49242-1298	250
Hope Heart Institute	1380 112th Ave NE Ste 200, Bellevue, WA 98004	250
Hope Heart Institute	1380 112th Ave NE Ste 200, Bellevue, WA 98004	250
Human Life Education Foundation	14400 Bel Red Rd Ste 207, Bellevue, WA 98007-3952	100
Human Life Education Foundation	14400 Bel Red Rd Ste 207, Bellevue, WA 98007-3952	100
Issaquah Valley Community Svcs	PO Box 652, Issaquah, WA 98027-0024	250
Kittitas Co Head Start/ECAP	220 E Helena Ave, Ellensburg, WA 98926	250
Kittitas Co Head Start/ECAP	220 E Helena Ave, Ellensburg, WA 98926	250
Kittitas Co Search & Rescue - Sergeant Fred Slyfield	205 W 5th St, Ellensburg, WA 98926	250
Kittitas Co Search & Rescue - Sergeant Fred Slyfield	205 W 5th St, Ellensburg, WA 98926	250
Kittitas Fire District 7	123 E 1st St, Cle Elum, WA 98922-1101	100
Kittitas Fire District 7	123 E 1st St, Cle Elum, WA 98922-1101	100
Leadership Institute - Steven P J Wood Bldg	1101 North Highland St, Arlington, VA 22201	250
Leadership Institute - Steven P J Wood Bldg	1101 North Highland St, Arlington, VA 22201	250
Life Choices of King County	1209 6th Ave, Tacoma, WA 98405-4004	100
Life Enrichment Options	PO Box 117, Issaquah, WA 98027-0006	1,000
Life Enrichment Options	PO Box 117, Issaquah, WA 98027-0006	1,000
Lifewire	PO Box 6398, Bellevue, WA 98008-0398	250
Lifewire	PO Box 6398, Bellevue, WA 98008-0398	250
Maryknoll Fathers & Brothers	PO Box 302, Maryknoll, NY 10545-0302	500
Mercatus Center - George Mason University Foundation	3301 N Fairfax Drive, Arlington, VA 22201-4433	100
Millionaire Club	2515 Western Ave, Seattle, WA 98121-1387	250
Millionaire Club	2515 Western Ave, Seattle, WA 98121-1387	250
Missionaries of Charity	335 E 145th St, Bronx, NY 10451-5899	250
Missionaries of Charity	335 E 145th St, Bronx, NY 10451-5899	250
Mt Si Senior Center	PO Box 806, North Bend, WA 98045-0806	250
Mt Si Senior Center	PO Box 806, North Bend, WA 98045-0806	250
Nat'l Multiple Sclerosis Society	192 Nickerson St Ste 100, Seattle, WA 98109-1632	500
Nat'l Multiple Sclerosis Society	192 Nickerson St Ste 100, Seattle, WA 98109-1632	250
Northwest Kidney Center	PO Box 3035, Seattle, WA 98114-3035	250
Northwest Kidney Center	PO Box 3035, Seattle, WA 98114-3035	250
Oblate Fathers - Bill Antone	391 Michigan Ave NE, Washington, DC 20017-1516	1,000
Oblate Fathers - Bill Antone	391 Michigan Ave NE, Washington, DC 20017-1516	1,000
OLS Annual Catholic Appeal	PO Box 909, Snoqualmie, WA 98065	2,000
Our Lady of Sorrows	39025 SE Alpha St, Snoqualmie, WA 98065-0909	20,000
Our Lady of Sorrows	39025 SE Alpha St, Snoqualmie, WA 98065-0909	20,000
Overlake Hospital Foundation	1035 116th Ave NE, Bellevue, WA 98004-4604	250
Paralyzed Veterans of America	801 18th St NW, Washington, DC 20077-2890	250
Paralyzed Veterans of America	801 18th St NW, Washington, DC 20077-2890	250
Project Rachel	100 23rd Ave S, Seattle, WA 98144-2302	250
Project Rachel	100 23rd Ave S, Seattle, WA 98144-2302	250
Providence Marianwood Foundation	3725 Providence Point Dr SE, Issaquah, WA 98029-7219	1,000
Providence Marianwood Foundation	3725 Providence Point Dr SE, Issaquah, WA 98029-7219	1,000
Reagan Presidential Foundation	40 Presidential Dr Ste 200, Simi Valley, CA 93065-0600	250
Redemptorist Missions	107 Duke of Gloucester Street, Annapolis, MD 21401	500
Sacred Heart Shelter	232 Warren Ave N, Seattle, WA 98109-4815	1,000
Sacred Heart Shelter	232 Warren Ave N, Seattle, WA 98109-4815	1,000
Salesian Missions	2 Lefevre Lane, New Rochelle, NY 10802	250

WHITAKER FOUNDATION
 EIN 23-7301744
 2014 FORM 990-PF
 ATTACHMENT A
 Page 3 of 3

Salesian Missions	2 Lefevre Lane, New Rochelle, NY 10802	250
Salvation Army	PO Box 9219, Seattle, WA 98109	100
Salvation Army	PO Box 9219, Seattle, WA 98109	100
Seattle Univ Development Fund	900 Broadway, Seattle, WA 98122-6140	250
Seattle Univ Development Fund	900 Broadway, Seattle, WA 98122-6140	250
Sisters of St Joseph of Peace	1663 Killarney Way, Bellevue, WA 98009-0248	1,000
Sisters of St Joseph of Peace	1663 Killarney Way, Bellevue, WA 98009-0248	1,000
Snoqualmie Valley Historical Society	PO Box 179, North Bend, WA 98045-0179	100
Snoqualmie Valley Historical Society	PO Box 179, North Bend, WA 98045-0179	250
Southeastern Legal Foundation	2255 Sewell Mill Road Ste 320, Marietta, GA 30062	250
Southeastern Legal Foundation	2255 Sewell Mill Road Ste 320, Marietta, GA 30062	250
Special Olympics	1809 7th Ave Ste 1509, Seattle, WA 98101	1,000
Special Olympics	1809 7th Ave Ste 1509, Seattle, WA 98101	1,000
St Anthony's of Padua	31911 East Blanche, Carnation, WA 98014	250
St Anthony's of Padua	31911 East Blanche, Carnation, WA 98014	250
St James Cathedral ESL	804 9th Ave, Seattle, WA 98104-1296	250
St James Cathedral ESL	804 9th Ave, Seattle, WA 98104-1296	250
St Joseph School	PO Box 200, Issaquah, WA 98027-0009	500
St Joseph School	PO Box 200, Issaquah, WA 98027-0009	250
St Jude Hospital	501 St Jude Place, Memphis, TN 38105-9959	250
St Jude Hospital	501 St Jude Place, Memphis, TN 38105-9959	250
St Labre Indian School - Major & Planned Giving dept	PO Box 797, Ashland, MT 59003	500
St Labre Indian School - Major & Planned Giving dept	PO Box 797, Ashland, MT 59003	500
St Martin De Porres Shelter	1561 Alaskan Way S, Seattle, WA 98134-1102	1,000
St Martin De Porres Shelter	1561 Alaskan Way S, Seattle, WA 98134-1102	1,000
St Martins Development Office	5300 Pacific Ave SE, Lacey, WA 98027-0001	250
St Martins Development Office	5300 Pacific Ave SE, Lacey, WA 98027-0001	250
St Vincent de Paul Society	PO Box 909, Snoqualmie, WA 98065	1,000
St Vincent de Paul Society	PO Box 909, Snoqualmie, WA 98065	1,000
Toys for Tots Foundation	PO Box 4002896, Des Moines, IA 50340-2896	250
Toys for Tots Foundation	PO Box 4002896, Des Moines, IA 50340-2896	250
US Olympic Committee	27 South Tejon, Colorado Springs, CO 80909	100
US Olympic Committee	27 South Tejon, Colorado Springs, CO 80909	100
USO World Headquarters	PO Box 96860, Washington, DC 20077-0001	250
USO World Headquarters	PO Box 96860, Washington, DC 20077-0001	250
Visitation School Development	2455 Visitation Dr , Mendota Heights, MN 55120-1677	250
Washington Policy Center	PO Box 3643, Seattle, WA 98124-3643	250
Washington Policy Center	PO Box 3643, Seattle, WA 98124-3643	250
World War II Memorial Fund	PO Box 96766, Washington, DC 20090-6766	250
Oblate Missions	391 Michigan Ave NE, Washington, DC 20017-1516	15,000
University Of Washington	407 Gerberding Hall, Seattle, WA 98195	1,000
Seattle Pacific University	3307 3rd Ave West, Seattle, WA 98119	1,000
Catholic Ed Resource Ctr	14400 Bel-Red Road #207, Bellevue, WA 98007	5,000
Providence Marian Foundation	3725 Providence Point Dr SE, Issaquah, WA 98029-7219	2,000
Our Lady of Sorrows-Peter's Pence	39025 SE Alpha St, Snoqualmie, WA 98065-0909	500
Snoqualmie Valley Rotary	PO Box 1463, North Bend, WA 98045	1,000
Crossroads	PO BOX 2219, Columbia, MD 21045	200

126,000