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Return of Private Foundation

OMB No 1545-0052

Department of the Treasury
Internal Revenue Service

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

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.

2014

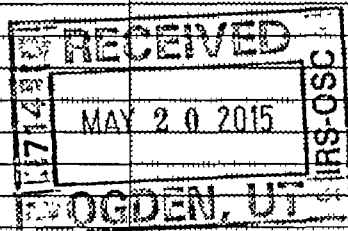
Open to Public Inspection

For calendar year 2014 or tax year beginning

, and ending

| | | |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name of foundation WEST FOUNDATION, INC. | | A Employer identification number 23-7416727 |
| Number and street (or P.O. box number if mail is not delivered to street address) 111 MONUMENT CIRCLE | Room/suite 220 | B Telephone number 317-972-0204 |
| City or town, state or province, country, and ZIP or foreign postal code INDIANAPOLIS, IN 46204 | | 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 | | 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) \$ 5,847,066. | J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ | 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).) | | (a) Revenue and expenses per books | (b) Net investment income | (c) Adjusted net income | (d) Disbursements for charitable purposes (cash basis only) |
|-----------------------------------------------------------------------------------------------------------------------------------------------------|--|------------------------------------|---------------------------|-------------------------|-------------------------------------------------------------|
| 1 Contributions, gifts, grants, etc., received | | | | N/A | |
| 2 Check <input checked="" type="checkbox"/> If the foundation is not required to attach Sch. B | | | | | |
| 3 Interest on savings and temporary cash investments | | 18. | 18. | | STATEMENT 1 |
| 4 Dividends and interest from securities | | 90,313. | 90,313. | | STATEMENT 2 |
| 5a Gross rents | | | | | |
| b Net rental income or (loss) | | | | | |
| 6a Net gain or (loss) from sale of assets not on line 10 | | 191,282. | | | |
| b Gross sales price for all assets on line 6a | | 2,695,241. | | | |
| 7 Capital gain net income (from Part IV, line 2) | | | 191,282. | | |
| 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) | | | | | |
| 11 Other income | | 33. | 33. | | STATEMENT 3 |
| 12 Total. Add lines 1 through 11 | | 281,646. | 281,646. | | |
| 13 Compensation of officers, directors, trustees, etc | | 77,985. | 0. | | 77,985. |
| 14 Other employee salaries and wages | | 188,974. | 0. | | 188,974. |
| 15 Pension plans, employee benefits | | | | | |
| 16a Legal fees | | | | | |
| b Accounting fees | | 1,550. | 0. | | 1,550. |
| c Other professional fees | | | | | |
| 17 Interest | | | | | |
| 18 Taxes | | 25,443. | 95. | | 20,120. |
| 19 Depreciation and depletion | | | | | |
| 20 Occupancy | | 37,046. | 0. | | 37,046. |
| 21 Travel, conferences, and meetings | | | | | |
| 22 Printing and publications | | | | | |
| 23 Other expenses | | 82,990. | 52,750. | | 30,240. |
| 24 Total operating and administrative expenses. Add lines 13 through 23 | | 413,988. | 52,845. | | 355,915. |
| 25 Contributions, gifts, grants paid | | 540,100. | | | 540,100. |
| 26 Total expenses and disbursements. Add lines 24 and 25 | | 954,088. | 52,845. | | 896,015. |
| 27 Subtract line 26 from line 12. | | -672,442. | | | |
| a Excess of revenue over expenses and disbursements | | | 228,801. | | |
| b Net investment income (if negative, enter -0-) | | | | | |
| 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

| | | 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 | 272,173. | 213,135. | 213,135. |
| | 3 Accounts receivable ▶ 819. | | 819. | 819. |
| | 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 | | 66,084. | 66,084. |
| | 7 Other notes and loans receivable ▶ | | | |
| | 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 | | | |
| | b Investments - corporate stock STMT 9 | 4,272,939. | 3,600,645. | 4,644,069. |
| | c Investments - corporate bonds STMT 10 | 718,626. | 741,315. | 922,959. |
| | 11 Investments - land, buildings, and equipment basis ▶ | | | |
| Less: accumulated depreciation ▶ | | | | |
| 12 Investments - mortgage loans | | | | |
| 13 Investments - other | | | | |
| 14 Land, buildings, and equipment: basis ▶ 71,108. | | | | |
| Less: accumulated depreciation STMT 11 ▶ 71,108. | | | | |
| 15 Other assets (describe ▶) | | | | |
| 16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item 1) | 5,263,738. | 4,621,998. | 5,847,066. | |
| 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 | | | |
| | 22 Other liabilities (describe ▶) | | | |
| | 23 Total liabilities (add lines 17 through 22) | 0. | 0. | |
| Net Assets or Fund Balances | Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> | | | |
| | and complete lines 24 through 26 and lines 30 and 31. | | | |
| | 24 Unrestricted | | | |
| | 25 Temporarily restricted | | | |
| | 26 Permanently restricted | | | |
| | Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> | | | |
| | and complete lines 27 through 31. | | | |
| | 27 Capital stock, trust principal, or current funds | 400,000. | 400,000. | |
| | 28 Paid-in or capital surplus, or land, bldg., and equipment fund | 3,470,985. | 3,470,985. | |
| | 29 Retained earnings, accumulated income, endowment, or other funds | 1,392,753. | 751,013. | |
| 30 Total net assets or fund balances | 5,263,738. | 4,621,998. | | |
| 31 Total liabilities and net assets/fund balances | 5,263,738. | 4,621,998. | | |

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 | 5,263,738. |
| 2 Enter amount from Part I, line 27a | 2 | -672,442. |
| 3 Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 7 | 3 | 38,058. |
| 4 Add lines 1, 2, and 3 | 4 | 4,629,354. |
| 5 Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 8 | 5 | 7,356. |
| 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 | 6 | 4,621,998. |

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 | | | | |
| b SEE ATTACHED STATEMENT | | | | |
| 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 | | | |
| b | | | |
| c | | | |
| d | | | |
| e 2,695,241. | | 2,503,959. | 191,282. |

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

| (i) FMV as of 12/31/69 | (j) Adjusted basis as of 12/31/69 | (k) Excess of col (i) over col (j), if any | (l) Gains (Col (h) gain minus col. (k), but not less than -0-) or Losses (from col (h)) |
|------------------------|--------------------------------------|-----------------------------------------------|-----------------------------------------------------------------------------------------------|
| a | | | |
| b | | | |
| c | | | |
| d | | | |
| e | | | 191,282. |

| | | | |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|----------|----------|
| 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 | 191,282. |
| 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) If (loss), enter -0- in Part I, line 8 } | | 3 | N/A |

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 the 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 | 536,221. | 5,817,882. | .092168 |
| 2012 | 666,863. | 5,551,630. | .120120 |
| 2011 | 549,436. | 5,640,148. | .097415 |
| 2010 | 473,297. | 5,527,924. | .085619 |
| 2009 | 431,075. | 4,937,533. | .087306 |

| | | |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|------------|
| 2 Total of line 1, column (d) | 2 | .482628 |
| 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 | .096526 |
| 4 Enter the net value of noncharitable-use assets for 2014 from Part X, line 5 | 4 | 5,916,928. |
| 5 Multiply line 4 by line 3 | 5 | 571,137. |
| 6 Enter 1% of net investment income (1% of Part I, line 27b) | 6 | 2,288. |
| 7 Add lines 5 and 6 | 7 | 573,425. |
| 8 Enter qualifying distributions from Part XII, line 4 | 8 | 896,015. |

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 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) | | 1 | 2,288. |
| b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b | | | |
| c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b) | | | |
| 2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) | | 2 | 0. |
| 3 Add lines 1 and 2 | | 3 | 2,288. |
| 4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) | | 4 | 0. |
| 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- | | 5 | 2,288. |
| 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 | | 0. |
| 8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached | 8 | | 51. |
| 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed | 9 | | 2,339. |
| 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

| | 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? | | X |
| b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? 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. | | X |
| c Did the foundation file Form 1120-POL for this year? | | X |
| 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? If "Yes," attach a detailed description of the activities. | | X |
| 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 | | X |
| 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? | | X |
| 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? If "Yes," attach the statement required by General Instruction T. | | X |
| 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? | X | |
| 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 | X | |
| 8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> IN | | |
| 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 | X | |
| 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 | | X |
| 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses | | X |

N/A

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) | | | X |
| 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) | | | X |
| 13 | Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A | | X | |
| 14 | The books are in care of ► JOANNA DAY Located at ► 111 MONUMENT CIRCLE, STE. 220, INDIANAPOLIS, IN Telephone no. ► 317-972-0204 ZIP+4 ► 46204 | | | |
| 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 | N/A |
| 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 X |

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)? Organizations relying on a current notice regarding disaster assistance check here | N/A | |
| 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? | | X |
| 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 ► | <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) | N/A | |
| c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► | | |
| 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.) | N/A | |
| 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? | | X |
| 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? | | X |

Form 990-PF (2014)

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)?

N/A

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?

N/A

☐ 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**

X

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?

N/A

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.

| (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 |
|------------------------|-----------------------------------------------------------|-------------------------------------------|-----------------------------------------------------------------------|---------------------------------------|
| EMILY WEST | EXECUTIVE DIRECTOR | | | |
| 332 N. EAST STREET | | | | |
| INDIANAPOLIS, IN 46208 | 30.00 | 77,985. | 0. | 0. |
| BEKAH JONES | DIRECTOR | | | |
| 1110 E 135TH STREET | | | | |
| GRANDVIEW, MO 64030 | 0.00 | 0. | 0. | 0. |
| SUZANNA BLOOM | DIRECTOR | | | |
| PO BOX 1123 | | | | |
| CLARK, CO 80428 | 0.00 | 0. | 0. | 0. |
| | | | | |
| | | | | |
| | | | | |

2 Compensation of five highest-paid employees (other than those included on line 1). 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 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 | 5,661,609. |
| b | Average of monthly cash balances | 1b | 345,425. |
| c | Fair market value of all other assets | 1c | |
| d | Total (add lines 1a, b, and c) | 1d | 6,007,034. |
| e | Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) | 1e | 0. |
| 2 | Acquisition indebtedness applicable to line 1 assets | 2 | 0. |
| 3 | Subtract line 2 from line 1d | 3 | 6,007,034. |
| 4 | Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions) | 4 | 90,106. |
| 5 | Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4 | 5 | 5,916,928. |
| 6 | Minimum investment return. Enter 5% of line 5 | 6 | 295,846. |

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 | 295,846. |
| 2a | Tax on investment income for 2014 from Part VI, line 5 | 2a | 2,288. |
| b | Income tax for 2014. (This does not include the tax from Part VI.) | 2b | |
| c | Add lines 2a and 2b | 2c | 2,288. |
| 3 | Distributable amount before adjustments. Subtract line 2c from line 1 | 3 | 293,558. |
| 4 | Recoveries of amounts treated as qualifying distributions | 4 | 0. |
| 5 | Add lines 3 and 4 | 5 | 293,558. |
| 6 | Deduction from distributable amount (see instructions) | 6 | 0. |
| 7 | Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 | 7 | 293,558. |

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 | 896,015. |
| b | Program-related investments - total from Part IX-B | 1b | 0. |
| 2 | Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes | 2 | |
| 3 | Amounts set aside for specific charitable projects that satisfy the: | | |
| a | Suitability test (prior IRS approval required) | 3a | |
| b | Cash distribution test (attach the required schedule) | 3b | |
| 4 | Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4 | 4 | 896,015. |
| 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 | 5 | 2,288. |
| 6 | Adjusted qualifying distributions. Subtract line 5 from line 4 | 6 | 893,727. |

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 | | | | 293,558. |
| 2 Undistributed income, if any, as of the end of 2014 | | | | |
| a Enter amount for 2013 only | | | 0. | |
| b Total for prior years. | | 0. | | |
| 3 Excess distributions carryover, if any, to 2014. | | | | |
| a From 2009 | 187,783. | | | |
| b From 2010 | 211,333. | | | |
| c From 2011 | 270,473. | | | |
| d From 2012 | 390,907. | | | |
| e From 2013 | 251,395. | | | |
| f Total of lines 3a through e | 1,311,891. | | | |
| 4 Qualifying distributions for 2014 from Part XII, line 4 ▶ \$ | 896,015. | | | |
| 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 | | | | 293,558. |
| e Remaining amount distributed out of corpus | 602,457. | | | |
| 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: | 1,914,348. | | | |
| a Corpus Add lines 3f, 4c, and 4e Subtract line 5 | | | | |
| b Prior years' undistributed income Subtract line 4b from line 2b | | 0. | | |
| c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed | | 0. | | |
| d Subtract line 6c from line 6b. Taxable amount - see instructions | | 0. | | |
| e Undistributed income for 2013 Subtract line 4a from line 2a. Taxable amount - see instr. | | | 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 | 187,783. | | | |
| 9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a | 1,726,565. | | | |
| 10 Analysis of line 9: | | | | |
| a Excess from 2010 | 211,333. | | | |
| b Excess from 2011 | 270,473. | | | |
| c Excess from 2012 | 390,907. | | | |
| d Excess from 2013 | 251,395. | | | |
| e Excess from 2014 | 602,457. | | | |

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> SEE ATTACHMENT #1 | | | | 540,100. |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| Total | | | ▶ 3a | 540,100. |
| b <i>Approved for future payment</i> NONE | | | | |
| | | | | |
| | | | | |
| Total | | | ▶ 3b | 0. |

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 | | 1a(1) | X |
| (2) Other assets | | 1a(2) | X |
| b Other transactions: | | | |
| (1) Sales of assets to a noncharitable exempt organization | | 1b(1) | X |
| (2) Purchases of assets from a noncharitable exempt organization | | 1b(2) | X |
| (3) Rental of facilities, equipment, or other assets | | 1b(3) | X |
| (4) Reimbursement arrangements | | 1b(4) | X |
| (5) Loans or loan guarantees | | 1b(5) | X |
| (6) Performance of services or membership or fundraising solicitations | | 1b(6) | X |
| c Sharing of facilities, equipment, mailing lists, other assets, or paid employees | | 1c | X |
| 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 |
| N/A | | |
| | | |
| | | |
| | | |
| | | |

**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.

Signature of officer or trustee Ernest A. West

Date _____

15/12/15

Title

Executive Dir

May the IRS discuss this return with the preparer shown below (see instr.)?

☒ Yes ☐ No

**Paid
Preparer
Use Only**

Print/Type preparer's name

SUSIE M. KEATON,
CPA

Preparer's signature

SUSIE M. KEATON.

Date

05/07/15

Check ☐ self-employed

| |
|------|
| PTIN |
|------|

P00765420

Firm's name ► SOMERSET CPAS PC

Firm's EIN ► 20-1717681

Firm's address ► 3925 RIVER CROSSING PKWY STE 300
INDIANAPOLIS, IN 46240

Phone no 317-472-2200

WEST FOUNDATION, INC.

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 | WELLS FARGO 1702 | P | VARIOUS | 12/31/14 |
| b | WELLS FARGO 1702 | P | VARIOUS | 12/31/14 |
| c | WELLS FARGO 6873 | P | 11/22/13 | 10/09/14 |
| d | WELLS FARGO 6873 | P | VARIOUS | 12/31/14 |
| e | WELLS FARGO 5584 | P | VARIOUS | 12/31/14 |
| f | WELLS FARGO 5584 | P | VARIOUS | 12/31/14 |
| g | WELLS FARGO 5584 | P | VARIOUS | 12/31/14 |
| h | WELLS FARGO 6343 | P | VARIOUS | 12/31/14 |
| i | WELLS FARGO 6343 | P | VARIOUS | 12/31/14 |
| j | WELLS FARGO 1934 | P | VARIOUS | 12/31/14 |
| k | WELLS FARGO 1934 | P | VARIOUS | 12/31/14 |
| l | | | | |
| m | | | | |
| n | | | | |
| o | | | | |

| (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 | 361,120. | 326,340. | 34,780. |
| b | 734,152. | 712,192. | 21,960. |
| c | 232. | 263. | -31. |
| d | 12,861. | 8,881. | 3,980. |
| e | 10,237. | 10,382. | -145. |
| f | 47,422. | 39,819. | 7,603. |
| g | 30,283. | 16,946. | 13,337. |
| h | 622,302. | 622,055. | 247. |
| i | 290,924. | 200,026. | 90,898. |
| j | 363,650. | 411,084. | -47,434. |
| k | 222,058. | 155,971. | 66,087. |
| l | | | |
| m | | | |
| n | | | |
| o | | | |

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) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-") |
|---------------------------|--------------------------------------|-----------------------------------------------|------------------------------------------------------------------------------------------------------|
| a | | | 34,780. |
| b | | | 21,960. |
| c | | | -31. |
| d | | | 3,980. |
| e | | | -145. |
| f | | | 7,603. |
| g | | | 13,337. |
| h | | | 247. |
| i | | | 90,898. |
| j | | | -47,434. |
| k | | | 66,087. |
| l | | | |
| m | | | |
| n | | | |
| o | | | |

| | | | |
|---|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|----------|
| 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 | 191,282. |
| 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) If (loss), enter "-0-" in Part I, line 8 } | 3 | N/A |

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

| SOURCE | (A) REVENUE PER BOOKS | (B) NET INVESTMENT INCOME | (C) ADJUSTED NET INCOME |
|-------------------------|-----------------------------|---------------------------------|-------------------------------|
| FIFTH THIRD BANK | 18. | 18. | |
| TOTAL TO PART I, LINE 3 | 18. | 18. | |

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

| SOURCE | GROSS AMOUNT | CAPITAL GAINS DIVIDENDS | (A) REVENUE PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME |
|------------------------|-----------------|-------------------------------|-----------------------------|-----------------------------------|-------------------------------|
| WACHOVIA SECURITIES | 90,313. | 0. | 90,313. | 90,313. | |
| TO PART I, LINE 4 | 90,313. | 0. | 90,313. | 90,313. | |

FORM 990-PF OTHER INCOME STATEMENT 3

| DESCRIPTION | (A) REVENUE PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME |
|---------------------------------------|-----------------------------|-----------------------------------|-------------------------------|
| MISCELLANEOUS INVESTMENT INCOME | 33. | 33. | |
| TOTAL TO FORM 990-PF, PART I, LINE 11 | 33. | 33. | |

FORM 990-PF ACCOUNTING FEES STATEMENT 4

| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES |
|------------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| SOMERSET, TAX PREPARATION | 1,550. | 0. | | 1,550. |
| TO FORM 990-PF, PG 1, LN 16B | 1,550. | 0. | | 1,550. |

| | | | |
|-------------|-------|-----------|---|
| FORM 990-PF | TAXES | STATEMENT | 5 |
|-------------|-------|-----------|---|

| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES |
|-----------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| PAYROLL TAXES | 19,195. | 0. | | 19,195. |
| FEDERAL 990 PF - 2013 | 5,228. | 0. | | 0. |
| STATE UNEMPLOYMENT | 295. | 0. | | 295. |
| FEDERAL UNEMPLOYMENT | 630. | 0. | | 630. |
| FOREIGN TAX | 95. | 95. | | 0. |
| TO FORM 990-PF, PG 1, LN 18 | 25,443. | 95. | | 20,120. |

| | | | |
|-------------|----------------|-----------|---|
| FORM 990-PF | OTHER EXPENSES | STATEMENT | 6 |
|-------------|----------------|-----------|---|

| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES |
|-----------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| COMPUTER & TRAINING EXPENSE | 3,642. | 0. | | 3,642. |
| BROKER FEES | 52,750. | 52,750. | | 0. |
| TELEPHONE & INTERNET | 3,302. | 0. | | 3,302. |
| LIABILITY INSURANCE | 2,577. | 0. | | 2,577. |
| OFFICE SUPPLIES | 1,297. | 0. | | 1,297. |
| PARKING | 6,300. | 0. | | 6,300. |
| INTERNET SERVICE | 1,254. | 0. | | 1,254. |
| REPAIRS | 338. | 0. | | 338. |
| DUES & SUBSCRIPTIONS | 7,531. | 0. | | 7,531. |
| MISCELLANEOUS | 59. | 0. | | 59. |
| PAYCHEX EXPENSE | 666. | 0. | | 666. |
| POSTAGE | 274. | 0. | | 274. |
| WEBSITE COSTS | 3,000. | 0. | | 3,000. |
| TO FORM 990-PF, PG 1, LN 23 | 82,990. | 52,750. | | 30,240. |

| | | | |
|-------------|------------------------------------------------|-----------|---|
| FORM 990-PF | OTHER INCREASES IN NET ASSETS OR FUND BALANCES | STATEMENT | 7 |
|-------------|------------------------------------------------|-----------|---|

| DESCRIPTION | AMOUNT |
|----------------------------------------|---------|
| NONDIVIDEND DISTRIBUTION | 703. |
| ADJUSTMENT | 37,355. |
| TOTAL TO FORM 990-PF, PART III, LINE 3 | 38,058. |

| | | | |
|-------------|------------------------------------------------|-----------|---|
| FORM 990-PF | OTHER DECREASES IN NET ASSETS OR FUND BALANCES | STATEMENT | 8 |
|-------------|------------------------------------------------|-----------|---|

| DESCRIPTION | AMOUNT |
|-----------------------------------------|--------|
| ADJUSTMENT FOR DIFFERENCE IN COST BASIS | 7,356. |
| TOTAL TO FORM 990-PF, PART III, LINE 5 | 7,356. |

| | | | |
|-------------|-----------------|-----------|---|
| FORM 990-PF | CORPORATE STOCK | STATEMENT | 9 |
|-------------|-----------------|-----------|---|

| DESCRIPTION | BOOK VALUE | FAIR MARKET VALUE |
|-----------------------------------------------|------------|-------------------|
| INVESTMENTS - WELLS FARGO (SEE ATTACHMENT #2) | 1,269,258. | 1,468,210. |
| INVESTMENTS - WELLS FARGO (SEE ATTACHMENT #4) | 759,944. | 1,081,895. |
| INVESTMENTS - WELLS FARGO (SEE ATTACHMENT #5) | 949,502. | 1,283,363. |
| INVESTMENTS - WELLS FARGO (SEE ATTACHMENT #6) | 621,941. | 810,601. |
| TOTAL TO FORM 990-PF, PART II, LINE 10B | 3,600,645. | 4,644,069. |

| | | | |
|-------------|-----------------|-----------|----|
| FORM 990-PF | CORPORATE BONDS | STATEMENT | 10 |
|-------------|-----------------|-----------|----|

| DESCRIPTION | BOOK VALUE | FAIR MARKET VALUE |
|-----------------------------------------------|------------|-------------------|
| INVESTMENTS - WELLS FARGO (SEE ATTACHMENT #3) | 741,315. | 922,959. |
| TOTAL TO FORM 990-PF, PART II, LINE 10C | 741,315. | 922,959. |

| | | | |
|-------------|------------------------------------------------|-----------|----|
| FORM 990-PF | DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT | STATEMENT | 11 |
|-------------|------------------------------------------------|-----------|----|

| DESCRIPTION | COST OR OTHER BASIS | ACCUMULATED DEPRECIATION | BOOK VALUE |
|------------------------|------------------------|-----------------------------|------------|
| FURNITURE - LOBBY | 6,220. | 6,220. | 0. |
| FURNITURE - CONFERENCE | 8,908. | 8,908. | 0. |
| FURNITURE - WORK A | 1,944. | 1,944. | 0. |
| FURNITURE - PMW OFFICE | 3,637. | 3,637. | 0. |
| FURNITURE - SRW OFFICE | 11,716. | 11,716. | 0. |
| FURNITURE - EAW OFFICE | 11,045. | 11,045. | 0. |
| TELEPHONES | 2,100. | 2,100. | 0. |
| FURNITURE - OTHER | 2,002. | 2,002. | 0. |
| NCES | 1,245. | 1,245. | 0. |

. WEST FOUNDATION, INC.

23-7416727

| | | | |
|------------------------------------|---------|---------|----|
| TABLETOPS | 859. | 859. | 0. |
| ARMOIRE | 1,574. | 1,574. | 0. |
| BUSINESS MACHINES | 6,705. | 6,705. | 0. |
| COMPUTER AND INSTALLATION | 13,153. | 13,153. | 0. |
| TOTAL TO FM 990-PF, PART II, LN 14 | 71,108. | 71,108. | 0. |

2014 DEPRECIATION AND AMORTIZATION REPORT

FORM 990-PF PAGE 1

990-PF

| Asset No | Description | Date Acquired | Method | Life | Line No | Unadjusted Cost Or Basis | Bus % Excl | * Reduction In Basis | Basis For Depreciation | Accumulated Depreciation | Current Sec 179 | Current Year Deduction |
|----------|---------------------------|---------------|--------|------|---------|--------------------------|------------|----------------------|------------------------|--------------------------|-----------------|------------------------|
| 1 | FURNITURE - LOBBY | 0611962000 | DB | 7.00 | 17 | 6,220. | | | 6,220. | 6,220. | | 0. |
| 2 | FURNITURE - CONFERENCE | 0415962000 | DB | 7.00 | 17 | 8,908. | | | 8,908. | 8,908. | | 0. |
| 3 | FURNITURE - WORK A | 0320962000 | DB | 7.00 | 17 | 1,944. | | | 1,944. | 1,944. | | 0. |
| 4 | FURNITURE - PMW | 0525962000 | DB | 7.00 | 17 | 3,637. | | | 3,637. | 3,637. | | 0. |
| 5 | FURNITURE - SRW | 0610962000 | DB | 7.00 | 17 | 11,716. | | | 11,716. | 11,716. | | 0. |
| 6 | OFFICE FURNITURE - EAW | 0430962000 | DB | 7.00 | 17 | 11,045. | | | 11,045. | 11,045. | | 0. |
| 7 | TELEPHONES | 0301962000 | DB | 5.00 | 17 | 2,100. | | | 2,100. | 2,100. | | 0. |
| 8 | FURNITURE - OTHER | 0915962000 | DB | 7.00 | 17 | 2,002. | | | 2,002. | 2,002. | | 0. |
| 9 | NCES | 1010962000 | DB | 5.00 | 17 | 1,245. | | | 1,245. | 1,245. | | 0. |
| 10 | TABLETOPS | 0509972000 | DB | 7.00 | 17 | 859. | | | 859. | 859. | | 0. |
| 11 | ARMOIRE | 0522972000 | DB | 7.00 | 17 | 1,574. | | | 1,574. | 1,574. | | 0. |
| 12 | BUSINESS MACHINES | 0603972000 | DB | 5.00 | 17 | 6,705. | | | 6,705. | 6,705. | | 0. |
| 13 | COMPUTER AND INSTALLATION | 010105SL | | 5.00 | 17 | 13,153. | | | 13,153. | 13,153. | | 0. |
| | * TOTAL 990-PF PG 1 DEPR | | | | | 71,108. | | 0. | 71,108. | 71,108. | 0. | 0. |

428102
05-01-14

(D) - Asset disposed

* ITC, Section 179, Salvage, Bonus, Commercial Revitalization Deduction

| WEST FOUNDATION ORGANIZATION | CHARITABLE GIFTS | 2014 | PROJECT | GRANT DATE | GRANT AMOUNT |
|--------------------------------------------|----------------------------------|-----------------------------|--------------------------------------------|------------|--------------|
| African Wildlife Foundation | 1400 16th St, N W, Ste 120 | Washington, DC 20036 | Lupani Primary Schl In Zambia | 12/18/2014 | \$ 15,300 |
| ASAP | P O Box 2275 | Peachtree City, GA 30269 | Empowerment Prog In Haiti | 12/18/2014 | 7,000 |
| Barro Sin Plomo | 100 Summer Street | Boston, MA 02110 | Expand Train Prog Mexican Potters | | |
| blueEnergy | 972 Mission St, Ste. 500 | San Francisco, CA 94103 | "Prepared Family" initiative in Nicaragua | 9/29/2014 | 12,600 |
| Blue Planet Network | P O Box 3059 | Redwood City, CA 94060 | Member Training Program | 6/30/2014 | 10,000 |
| Boys Hope Girls Hope | 12120 Bridgeport Square Drive | Bridgeton, MO 63044-2607 | Guatemalan and Brazilian Homes Program | 6/30/2014 | 15,000 |
| Building Tomorrow | 407 Fulton Street | Indianapolis, IN 46202-3758 | Flexible Funding Grant | 12/18/2014 | 2,500 |
| Care 2 Communities | 1320 Centre St, Ste 202 | Newton, MA 02459 | Flexible Funding Grant | 12/18/2014 | 2,500 |
| CARE International | 70 E Lake Street, Rm 1430 | Chicago, IL 60601-5917 | Sup Young Domestic Workers/G&H | 12/18/2014 | 15,000 |
| Children International | 2000 E Red Bridge Rd | Kansas City, MO 64131 | Employment Prog, Zapopan, Mexico | 9/29/2014 | 15,000 |
| Cooperative of Education | 2300 Montana Ave, Ste 301 | Cincinnati, OH 45211 | Teacher Training Program | 9/29/2014 | 15,000 |
| Digital Divide Date | 972 Mission St, Ste. 500 | San Francisco, CA 94103 | P. Corporate Partnership Study | 12/18/2014 | 15,000 |
| Educate! | P O Box 12302 | Denver, CO 80212 | Scouting and Expansion Plan | 12/18/2014 | 15,000 |
| Futures Today (thru United Planet) | P O Box 523 | Riverdale, NY 10471 | Future Leaders Today | 12/18/2014 | 2,000 |
| Giving Back to Africa, Inc | P O Box 2328 | Bloomington, IN 47402 | Capacity Building Efforts | 3/31/2014 | 6,200 |
| Global Partnerships | 1932 First Avenue, Ste 400 | Seattle, WA 98101 | Health Services Pilot Projects | 6/30/2014 | 20,000 |
| Hesperian Foundation | 1919 Addison Street, #304 | Berkeley, CA 94704 | Healthguides for support of Book Projects | 3/31/2014 | 20,000 |
| H2O for Life | 1310 Highway 96 East, #235 | White Bear Lake, MN 55110 | Clean Water to Communities in Global South | 9/29/2014 | 10,000 |
| IDEX (Intl Devl Exchange) | 333 Valencia Street, Ste 250 | San Francisco, CA 94103 | For its IDEX Academy | 3/31/2014 | 15,000 |
| KickStart-International | 567 Sutter St, 3rd Floor | San Francisco, CA 94102 | Perf Mgmt & Eval System | 3/31/2014 | 15,000 |
| Lifewater International | P O Box 3131 | San Luis Obispo, CA 93403 | Work in Lira District of Uganda | 6/30/2014 | 15,000 |
| Mail Health Organizing Project | P O Box 426081 | Cambridge, MA 02142 | Health Program Pen-Urban Mali | 12/18/2014 | 15,000 |
| Move This World | 1330 Braddock Place, Ste 600 | Alexandria, VA 22314 | Prog Philippines | 9/29/2014 | 15,000 |
| Nurturing Minds, Inc | P O Box 144 | Valley Forge, PA 19481 | Flexible Fundinf Grant | 12/18/2014 | 2,500 |
| Plant With Purpose | 4747 Morena Blvd, Ste 100 | San Diego, CA 92117 | Rural Farm Communities/ Dominican Republic | 12/18/2014 | 15,000 |
| Project MedSend | 999 Oronoque Lane | Stratford, CT 06614-1379 | Parttime Devl Staff Member in CA | 12/18/2014 | 20,000 |
| ProLiteracy | 104 Marcellus Street | Syracuse, NY 13204 | Capital Fund | 6/30/2014 | 20,000 |
| Pro Mujer International | 253 W 35th St, 11th Floor South | New York, NY 10001 | Pro Mujer's initiatives program | 9/29/2014 | 15,000 |
| VisionSpring (Formerly Scojo Fdn) | 322 8th Avenue, Suite 201 | New York, NY 10001 | re-branding Campaign | 9/29/2014 | 15,000 |
| Shared Interest | 121 W 27th St, Ste 805 | New York, NY 10001 | Work in South Africa | 12/18/2014 | 15,000 |
| Smiles Forever | Box 217 | Renton, WA 98057 | Dental Hygienist Training Program | 3/31/2014 | 10,000 |
| SIL (Strategies for Intl Development) | 330Pennsylvania Ave, SE, Ste 304 | Washington, DC 20003 | for Guatemalan coffee farmers | 6/30/2014 | 15,000 |
| Syracuse University | 113 Bowne Hall | Syracuse, NY 13244-1090 | 3 of 3 Maxwell School's NGO L Inst | 3/21/2014 | 18,000 |
| (Replaces Moynihan Inst Of Global Affairs) | | | | | |
| TechnoServe | 1120 19th Street NW, 8th Floor | Washington, DC 20036 | Coffee and Cocoa Production in Peru | 6/30/2014 | 20,000 |
| The Aspen Institute | 1 Dupont Circle, NW, Ste 700 | Washington, DC 20036 | For Arts Partners at Aspen Program | 3/31/2014 | 25,000 |
| Trickle Up Program | See letter dated 12/28/12 Aspen | | On July 21, deposited a refund check of | 7/21/2014 | (15,000) |
| U-Touch | 104 West 27th St, 12th Floor | New York, NY 10001-6210 | Guatemalan Program | 6/30/2014 | 20,000 |
| Visionspring | 9945 Rue Chantemar | San Diego, CA 92131 | Hire new Devl Consultant | 9/29/2014 | 15,000 |
| Wild4Life | 322 8th Avenue, Suite 201 | New York, NY 10001-6210 | To Develop One-line Marketing approach | 9/29/2014 | 15,000 |
| World Community Service Foundation | 160 Montcalm Street | San Francisco, CA 94110 | Flexible Funding Grant | 12/18/2014 | 2,500 |
| YMCA of Greater Indianapolis | P O Box 412 | Brownburg, IN 46112 | Adult Literacy Prog, Afghanistan | 8/28/2014 | 15,000 |
| | 615 N Alabama St, Ste 220 | Indianapolis, IN 46204-1359 | Y-Liberia's Ebola Project | 12/18/2014 | 24,000 |
| | | | | | \$ 540,100 |

FIN 25-1416'12'1

| <u>DESCRIPTION</u> | <u>2014 BEGINNING BOOK VALUE</u> | <u>2014 ENDING BOOK VALUE</u> | <u>2014 ENDING FMV</u> |
|------------------------------|------------------------------------------|---------------------------------------|--------------------------------|
| APPLE INC | 290,284 | 165,876 | 220,760 |
| AT & T | 186,593 | 186,593 | 167,950 |
| AUXILIUM PHARMACEUTICALS INC | | 87,787 | 103,155 |
| CENTURYLINK INC | 39,675 | | |
| CHURCH & DWIGHT INC | 291,384 | 174,831 | 236,430 |
| ECOLAB | 134,507 | 134,507 | 209,040 |
| FIRST MERCHANTS CORP | 124,489 | 54,496 | 79,625 |
| HH GREGG | 103,765 | | |
| HUBSPOT INC | | 74,209 | 67,220 |
| MARATHON OIL CORP | 360 | | |
| MARATHON OIL CORP | 145 | | |
| MARKETAXESS HOLLDINGS INC | 85,379 | | |
| RUBICON TECHNOLOGIES | 107,705 | 53,852 | 10,054 |
| SURMODICS INC | 206,376 | 11,906 | 6,630 |
| TIME WARNER INC CABLE | 882 | | |
| TIME WARNER INC NEW | 83,586 | | |
| TYLER TECHNOLOGIES INC | 98,617 | 98,617 | 120,384 |
| WORKDAY INC | 98,262 | 149,033 | 138,737 |
| XILINX INC | 248,196 | 77,551 | 108,225 |
| TOTAL | 2,100,205 | 1,269,258 | 1,468,210 |

WEST FOUNDATION, INCORPORATED - 2014
#1 PACIFIC INCOME ADVISERS
1579-6873 WELLS FARGO

23-7416727

| <u>DESCRIPTION</u> | <u>2014 BEGINNING BOOK VALUE</u> | <u>2014 ENDING BOOK VALUE</u> | <u>2014 ENDING FMV</u> |
|------------------------------|------------------------------------------|---------------------------------------|--------------------------------|
| 3M CO | 14,856 | 14,856 | 22,183 |
| AFLAC INC | 15,613 | 15,613 | 16,678 |
| AIR PRODUCTS & CHEMICALS INC | 12,897 | 12,897 | 19,471 |
| ANALOG DEVICES INC | 15,052 | 15,052 | 18,155 |
| AT & T INC | 17,487 | 17,487 | 16,997 |
| AUTOMATIC DATA PROCESSING | 15,382 | 13,353 | 19,175 |
| BAXTER INTERNATIONAL INC | 15,597 | 15,597 | 16,344 |
| BECTON DICKINSON & CO | 14,388 | 14,388 | 21,152 |
| CHEVRON CORPORATION | 16,685 | 21,142 | 19,968 |
| CHUBB CORP | 14,735 | 14,735 | 18,004 |
| CLOROX COMPANY | 14,700 | 14,700 | 18,654 |
| COLGATE-PALMOLIVE CO | 14,870 | 14,870 | 17,989 |
| CONOCOPHILLIPS | 17,401 | 17,401 | 18,784 |
| EATON VANCE CORP NON VTG | 8,865 | 8,865 | 9,414 |
| EMERSON ELECTRIC CO | 14,086 | 19,168 | 19,630 |
| EXXON MOBIL CORP | 19,970 | 19,970 | 19,877 |
| FACTSET RESEARCH SYSTEMS INC | 12,403 | 12,403 | 17,172 |
| GENERAL MILLS INC | 13,984 | 13,984 | 16,106 |
| GENL DYNAMICS CORP COM | 13,672 | 13,672 | 24,084 |
| GRAINGER WW INC | 10,980 | 10,980 | 11,980 |
| HARRIS CORP DEL | 13,475 | 10,351 | 13,933 |
| ILLINOIS TOOL WORKS INC | 15,262 | 15,262 | 21,118 |
| IBM | 12,888 | 12,888 | 10,429 |
| JM SMUCKER CO | 15,742 | 15,742 | 16,056 |
| JOHNSON & JOHNSON | 15,123 | 19,470 | 24,051 |
| KELLOGG COMPANY | 14,346 | 14,346 | 15,117 |
| LOWES CO | 17,873 | 17,873 | 28,483 |
| MCDONALDS | 12,579 | 12,579 | 12,368 |
| MEDTRONIC INC | 15,452 | 15,452 | 21,877 |
| MICROSOFT CORP | 17,930 | 17,930 | 27,406 |
| NEXTERA ENERGY INC | 15,692 | 15,692 | 21,258 |
| NORDSTROM INC | 14,871 | 14,871 | 20,165 |
| NORFOLK SOUTHERN CORP | 14,255 | 14,255 | 21,155 |
| NORTHEAST UTILITIES | 14,705 | 14,705 | 18,732 |
| NOVARTIS AG SPON ADR | 14,464 | 14,464 | 18,903 |
| PAYCHEX INC | 14,042 | 14,042 | 17,868 |
| PEPSICO INCORPORATED | 14,472 | 14,472 | 17,304 |
| PHILLIPS 66 | 8,934 | 8,934 | 10,970 |
| POLARIS INDS INC | 19,889 | 15,815 | 22,535 |
| PRAXAIR INC | 16,506 | 16,506 | 18,527 |
| PROCTER & GAMBLE CO | 14,108 | 14,108 | 16,851 |
| QUALCOMM INC | | 13,448 | 13,156 |
| SCANA CORP COM | 6,310 | 6,310 | 7,792 |
| SIGMA ALDRICH CORP | 14,139 | 14,139 | 24,160 |
| SYSCO CORP | 13,608 | 13,608 | 16,114 |

ATTACHMENT 3

1579-6873 continued

| | | | |
|--------------------------|----------------|----------------|----------------|
| TARGET CORP | 14,569 | 14,569 | 16,776 |
| THE SOUTHERN COMPANY | 12,464 | 12,464 | 13,849 |
| UNITED TECHNOLOGIES CORP | 14,523 | 14,523 | 17,135 |
| VF CORPORATION | 15,227 | 15,227 | 26,062 |
| WALMART STORES INC | 14,976 | 19,559 | 22,501 |
| WISCONSIN ENERGY CORP | 6,578 | 6,578 | 8,491 |
| TOTAL - STOCKS | 718,626 | 741,315 | 922,959 |

WEST FOUNDATION, INCORPORATED - 2014
#3 ESTABROOK
4062-5584 WELLS FARGO

| DESCRIPTION | 2014 BEGINNING BOOK VALUE | 2014 ENDING BOOK VALUE | 2014 ENDING FMV |
|-----------------------------------|------------------------------------------|---------------------------------------|--------------------------------|
| ALLEGION PLC | 1,716 | | |
| ALLSTATE | 11,640 | 11,640 | 22,269 |
| AMERICAN EXPRESS | 12,844 | 12,844 | 24,376 |
| BB & T CORP | 11,478 | | |
| BANCOLATINOAMERICANO DE COM. | 13,356 | 18,497 | 23,267 |
| BORG WARNER | 14,906 | 14,087 | 27,420 |
| CISCO SYSTEMS | 23,122 | 23,122 | 32,710 |
| CITIGROUP INC NEW | | 30,717 | 33,386 |
| COSTCO WHSL | 11,682 | 13,766 | 20,696 |
| DUPONT | 28,792 | 28,792 | 41,998 |
| EMC CORP | 18,361 | 18,361 | 23,167 |
| EATON CORP | 16,942 | 15,072 | 22,087 |
| EOG RESOURCES | 20,528 | 17,201 | 28,726 |
| EQT CORP | 18,630 | 16,133 | 21,045 |
| FORD MOTOR CO | 22,673 | 29,476 | 36,611 |
| GULFMARK OFFSHORE INC NEW CLASS A | | 19,899 | 11,624 |
| HUMANA | 16,482 | 15,410 | 32,317 |
| INGERSOLL-RAND | 5,473 | | |
| INTEL C ORP | 28,239 | 23,917 | 37,959 |
| IBM | 18,366 | 18,366 | 18,290 |
| JPMORGAN | 34,175 | 34,175 | 47,623 |
| MACY'S INC | 10,613 | 10,613 | 26,892 |
| MERCK & CO INC NEW | 12,392 | 15,993 | 18,173 |
| MICROSOFT | 30,216 | 30,216 | 47,333 |
| NAVIGATOR HOLDINGS LTD | | 18,694 | 16,595 |
| NORFOLK | 22,373 | 22,373 | 37,487 |
| PROCTOR & GAMBLE | 17,355 | 17,355 | 23,137 |
| QEP RESOURCES | 14,328 | | |
| QUALCOMM INC | 20,892 | 20,892 | 25,941 |
| QUESTAR CORP | 13,090 | 13,090 | 18,075 |
| SANOFI-AVENTIS | 19,109 | 19,109 | 23,763 |
| SCHLUMBERGER LTD | 24,074 | 24,074 | 25,367 |
| SONOCO PRODUCTS | 18,246 | 18,246 | 22,374 |
| SPECTRA ENERGY | 19,694 | 19,694 | 26,354 |
| TARGET CORP | 12,251 | | |
| TIFFANY & CO | 11,492 | 11,492 | 19,983 |
| TRAVELERS COS | 16,110 | 16,110 | 26,357 |
| UNION PACIFIC CORP | 16,034 | 16,034 | 33,595 |
| UNITED HEALTH GROUP | 19,906 | 19,068 | 44,884 |
| US BANCORP | 20,505 | 20,505 | 31,959 |
| VERIZON COMM | 20,104 | 20,104 | 24,138 |
| WASTE MGMT | 19,351 | 19,351 | 26,584 |
| WEATHERFORD INTERNATIONAL LTD | 20,189 | 21,514 | 18,137 |
| WELLS FARGO CO | 26,649 | 23,942 | 39,196 |
| WESTERN UNION | | | |
| TOTAL | 734,381 | 759,944 | 1,081,895 |

ATTACHMENT 4

WEST FOUNDATION, INCORPORATED - 2014
#4 DORSEY WRIGHT
5153-6343 WELLS FARGO

| <u>DESCRIPTION</u> | <u>2014 BEGINNING BOOK VALUE</u> | <u>2014 ENDING BOOK VALUE</u> | <u>2014 ENDING FMV</u> |
|-----------------------------------|-------------------------------------------------|----------------------------------------------|---------------------------------------|
| ACTAVIS PLC | 39,598 | 39,598 | 81,342 |
| ALASKA AIR GROUP | 35,607 | 35,607 | 90,118 |
| ALCOA INC | | 47,649 | 55,249 |
| ALLIANT TEC HSYSTEMS INC | 41,090 | | |
| AMERISOURCEBERGEN CORP | | 40,818 | 40,211 |
| BIOGEN IDEC INC | 39,805 | 39,805 | 91,312 |
| BLACK HILLS CORPORATION | 33,844 | | |
| BOSTON SCIENTIFIC CORP | 42,025 | | |
| CBS | 35,099 | | |
| COOPER COS INC NEW | | 50,277 | 50,086 |
| DISCOVER FINANCIAL | 34,216 | 34,216 | 89,787 |
| FACEBOOK INC C LASS A | | 50,373 | 52,586 |
| FLOWSERVE CORP | 25,584 | | |
| GENWORTH FINANCIAL INC CL-A | 37,101 | | |
| HUNTINGTON INGALLS INDUSTRIES INC | 45,119 | 45,119 | 62,190 |
| JONES LANG LASALLE INC CL A | | 41,264 | 43,780 |
| KROGER COMPANY COMMON | 32,016 | | |
| MENTOR GRAPHICS CORP | 26,255 | | |
| MICROSOFT CORP | | 48,558 | 49,376 |
| MINERALS TECHNOLOGIES INC | 34,442 | 34,442 | 40,142 |
| MORGAN STANLEY & CO | | 39,270 | 42,525 |
| NETFLIX.COM INC | 34,898 | | |
| NEWELL RUBBERMAID INC | | 46,239 | 52,945 |
| NISOURCE INC | | 40,432 | 41,190 |
| OCEANEERING INTL INC | 35,371 | | |
| OMNICARE INC | 32,569 | 32,569 | 43,466 |
| PPG INDUSTRIES INC | 35,689 | | |
| PITNEY BOWES INC | 36,260 | | |
| RF MICRO DEVICES INC | | 38,992 | 67,737 |
| SEALED AIR CORP NEW | | 36,781 | 45,994 |
| SEMPRA ENERGY | | 40,939 | 40,312 |
| SERVICE CORP INTERNATIONAL | 36,263 | 36,263 | 60,155 |
| SM ENERGY CO COM | 34,589 | | |
| SUPERVALU INC | | 51,255 | 52,273 |
| UGI CORP NEW | | 41,571 | 41,436 |
| WESTERN DIGITAL CORP | | 37,465 | 49,151 |
| WORTHINGTON IND INC | 43,439 | | |
| YAHOO | 37,873 | | |
| TOTAL | 828,754 | 949,502 | 1,283,363 |

ATTACHMENT 5

7744-1934 WELLS FARGO

| <u>DESCRIPTION</u> | <u>2014 BEGINNING BOOK VALUE</u> | <u>2014 ENDING BOOK VALUE</u> | <u>2014 ENDING FMV</u> |
|----------------------------------------|------------------------------------------|---------------------------------------|--------------------------------|
| ACADIA HEALTHCARE CO | 15,684 | 13,245 | 23,260 |
| ACTAVIS PLC | | 6,336 | 6,178 |
| ADVANCE AUTO PARTS | | 10,113 | 11,627 |
| AFFILIATED MANAGERS GROUP | 10,758 | 28,011 | 30,775 |
| ALIBABA GRP HOLDING ADR LTD SPON 1 RCP | | 19,745 | 20,164 |
| ALLERGEN INC | | 7,702 | 13,181 |
| ALLIANCE DATA SYSTEMS CORP | 19,506 | 13,557 | 23,742 |
| AMAZON COM INC | 20,599 | 13,299 | 15,517 |
| BAIDU INC ADR | | 18,851 | 18,922 |
| BE AEROSPACE INC | 22,259 | 11,127 | 11,314 |
| BIOGEN IDEC INC | | 20,560 | 20,367 |
| CABOT OIL & GAS | 17,845 | | |
| CBRE GROUP INC CLASS A | | 10,620 | 11,234 |
| CELGENE CORP | 21,872 | 26,951 | 50,113 |
| CENTENE CORP | | 9,924 | 14,020 |
| CHIPOTLE MEXICAN GRILL CL A | 16,538 | 24,400 | 34,910 |
| CONTINENTAL RESOURCES INC | 15,141 | 9,537 | 8,784 |
| COPA HOLDINGS SA CL A | 9,588 | | |
| CVS HEALTH CORPORATION | | 10,021 | 11,365 |
| DISCOVERY COMMUNICATIONS INC A | 21,397 | 7,943 | 9,914 |
| DUNKIN' BRANDS GRP INC | 8,636 | | |
| ECOLAB INC | 5,527 | 9,273 | 9,720 |
| FACEBOOK INC CLASS A | | 23,369 | 28,477 |
| FINANCIAL ENGINES INC | 16,726 | | |
| FIRST REPUBLIC BANK SAN FRAN, CA | 6,132 | | |
| FLEETCOR TECHNOLOGIES | 12,895 | 7,675 | 17,399 |
| GARTNER INC NEW | 12,656 | 12,656 | 21,558 |
| GILEAD SCIENCES INC | 17,848 | 7,261 | 11,028 |
| GOOGLE | 7,144 | 2,650 | 4,211 |
| GUIDEWIRE SOFTWARE INC | 14,772 | | |
| HCA HOLDINGS INC | | 6,254 | 6,238 |
| ICON PLC | | 11,443 | 13,308 |
| INDEXX LABORATORIES INC | | 12,783 | 15,568 |
| KANSAS CITY SOUTHERN INDS INC | 15,244 | 6,220 | |
| KANSAS CITY SOUTHERN NEW | 5,232 | 5,232 | 15,010 |
| KLX INC | | 3,165 | 4,001 |
| LINKEDIN CORP CLASS A | 24,589 | | |
| LITHIA MTRS INC CL A | 5,201 | | |
| LKQ CORPORATION | 20,801 | | |
| LUMBER LIQUIDATORS HLDGS INC | 8,453 | | |
| MARKETAXESS HOLDINGS INC | 16,995 | | |
| MASTERCARD INC CL A | 19,708 | 19,708 | 35,326 |
| MCGRAW-HILL FINANCIAL INC | | 10,557 | 11,389 |
| MELCO PBL ENTERTAINMENT ADR | 14,893 | | |
| MIDDLEBY CORP | 13,609 | 17,545 | 24,379 |
| OLD DOMINION FREIGHT | | 10,452 | 10,947 |
| QIWI PLC SPONSORED ADR RPSTG CL B | 6,105 | | |
| REGENERON PHARMACEUTICAL INC | 16,220 | 27,994 | 38,564 |

ATTACHMENT U

7744-1934 continued

| | | | |
|--------------------------------|----------------|----------------|----------------|
| ROBERT HALF INC | | 18,512 | 20,491 |
| SALESFORCE.COM | 10,783 | 10,783 | 15,539 |
| SBA COMMUNICATIONS CORP | 21,058 | 21,058 | 33,228 |
| SHERMAN WILLIAMS CO | | 10,782 | 11,574 |
| SPS COMMERCE INC | 5,603 | | |
| STARBUCKS CORP | 11,725 | 11,725 | 16,164 |
| STERICYCLE INC | 13,625 | 10,208 | 14,550 |
| SUPER MICRO COMPUTER INC | | 6,187 | 6,453 |
| TESLA MOTORS | | 20,120 | 19,127 |
| TRACTOR SUPPLY COMPANY | 27,294 | 18,390 | 27,272 |
| TRIPADVISOR INC | 11,364 | 10,312 | 8,735 |
| TYLER TECHNOLOGIES INC | 5,727 | 12,096 | 15,869 |
| UNION PACIFIC | | 10,088 | 12,866 |
| UNITED RENTALS INC | | 5,501 | 6,223 |
| VIRTUS INVESTMENT PARTNERS INC | 8,815 | | |
| WORKDAY INC CLASS A | 27,340 | | |
| YELP INC | 5,689 | | |
| TOTAL | 609,597 | 621,941 | 810,601 |

Form **4562**Department of the Treasury
Internal Revenue Service (99)
Name(s) shown on return**Depreciation and Amortization**
(Including Information on Listed Property) 990-PF

▶ Attach to your tax return.

▶ Information about Form 4562 and its separate instructions is at www.irs.gov/form4562.

OMB No 1545-0172

2014Attachment
Sequence No 179

WEST FOUNDATION, INC.

FORM 990-PF PAGE 1

23-7416727

Part I Election To Expense Certain Property Under Section 179 Note: If you have any listed property, complete Part V before you complete Part I.

| | | | |
|----|-----------------------------------------------------------------------------------------------------------------------------------------|------------------------------|------------------|
| 1 | Maximum amount (see instructions) | 1 | 500,000. |
| 2 | Total cost of section 179 property placed in service (see instructions) | 2 | |
| 3 | Threshold cost of section 179 property before reduction in limitation | 3 | 2,000,000. |
| 4 | Reduction in limitation. Subtract line 3 from line 2. If zero or less, enter -0- | 4 | |
| 5 | Dollar limitation for tax year. Subtract line 4 from line 1. If zero or less, enter -0-. If married filing separately, see instructions | 5 | |
| 6 | (a) Description of property | (b) Cost (business use only) | (c) Elected cost |
| 7 | Listed property. Enter the amount from line 29 | 7 | |
| 8 | Total elected cost of section 179 property. Add amounts in column (c), lines 6 and 7 | 8 | |
| 9 | Tentative deduction. Enter the smaller of line 5 or line 8 | 9 | |
| 10 | Carryover of disallowed deduction from line 13 of your 2013 Form 4562 | 10 | |
| 11 | Business income limitation. Enter the smaller of business income (not less than zero) or line 5 | 11 | |
| 12 | Section 179 expense deduction. Add lines 9 and 10, but do not enter more than line 11 | 12 | |
| 13 | Carryover of disallowed deduction to 2015. Add lines 9 and 10, less line 12 | 13 | |

Note: Do not use Part II or Part III below for listed property. Instead, use Part V.

Part II Special Depreciation Allowance and Other Depreciation (Do not include listed property.)

| | | | |
|----|--------------------------------------------------------------------------------------------------------------------------|----|--|
| 14 | Special depreciation allowance for qualified property (other than listed property) placed in service during the tax year | 14 | |
| 15 | Property subject to section 168(f)(1) election | 15 | |
| 16 | Other depreciation (including ACRS) | 16 | |

Part III MACRS Depreciation (Do not include listed property.) (See instructions.)**Section A**

| | | | |
|----|------------------------------------------------------------------------------------------------------------------------------------------------------------|----|--|
| 17 | MACRS deductions for assets placed in service in tax years beginning before 2014 | 17 | |
| 18 | If you are electing to group any assets placed in service during the tax year into one or more general asset accounts, check here <input type="checkbox"/> | | |

Section B - Assets Placed in Service During 2014 Tax Year Using the General Depreciation System

| (a) Classification of property | (b) Month and year placed in service | (c) Basis for depreciation (business/investment use only - see instructions) | (d) Recovery period | (e) Convention | (f) Method | (g) Depreciation deduction |
|--------------------------------|--------------------------------------|------------------------------------------------------------------------------|---------------------|----------------|------------|----------------------------|
| 19a 3-year property | | | | | | |
| b 5-year property | | | | | | |
| c 7-year property | | | | | | |
| d 10-year property | | | | | | |
| e 15-year property | | | | | | |
| f 20-year property | | | | | | |
| g 25-year property | | | 25 yrs. | | S/L | |
| h Residential rental property | / | | 27.5 yrs. | MM | S/L | |
| i Nonresidential real property | / | | 39 yrs. | MM | S/L | |
| | / | | | MM | S/L | |

Section C - Assets Placed in Service During 2014 Tax Year Using the Alternative Depreciation System

| | | | | | |
|----------------|---|--|---------|-----|-----|
| 20a Class life | | | | S/L | |
| b 12-year | | | 12 yrs. | S/L | |
| c 40-year | / | | 40 yrs. | MM | S/L |

Part IV Summary (See instructions.)

| | | | |
|----|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|----|
| 21 | Listed property. Enter amount from line 28 | 21 | |
| 22 | Total. Add amounts from line 12, lines 14 through 17, lines 19 and 20 in column (g), and line 21. Enter here and on the appropriate lines of your return. Partnerships and S corporations - see instr. | 22 | 0. |
| 23 | For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs | 23 | |

Part V**Listed Property** (Include automobiles, certain other vehicles, certain aircraft, certain computers, and property used for entertainment, recreation, or amusement.)**Note:** For any vehicle for which you are using the standard mileage rate or deducting lease expense, complete **only** 24a, 24b, columns (a) through (c) of Section A, all of Section B, and Section C if applicable.**Section A - Depreciation and Other Information** (Caution: See the instructions for limits for passenger automobiles.)**24a** Do you have evidence to support the business/investment use claimed? ☐ **Yes** ☐ **No** **24b** If "Yes," is the evidence written? ☐ **Yes** ☐ **No**

| (a) Type of property (list vehicles first) | (b) Date placed in service | (c) Business/ investment use percentage | (d) Cost or other basis | (e) Basis for depreciation (business/investment use only) | (f) Recovery period | (g) Method/ Convention | (h) Depreciation deduction | (i) Elected section 179 cost |
|--------------------------------------------------|-------------------------------------|--------------------------------------------------|-------------------------------|--------------------------------------------------------------------|---------------------------|------------------------------|----------------------------------|---------------------------------------|
|--------------------------------------------------|-------------------------------------|--------------------------------------------------|-------------------------------|--------------------------------------------------------------------|---------------------------|------------------------------|----------------------------------|---------------------------------------|

25 Special depreciation allowance for qualified listed property placed in service during the tax year and used more than 50% in a qualified business use**25****26** Property used more than 50% in a qualified business use:

| | | | | | | | | |
|--|--|---|--|--|--|--|--|--|
| | | % | | | | | | |
| | | % | | | | | | |
| | | % | | | | | | |

27 Property used 50% or less in a qualified business use:

| | | | | | | | | |
|--|--|---|--|--|--|-------|--|--|
| | | % | | | | S/L - | | |
| | | % | | | | S/L - | | |
| | | % | | | | S/L - | | |

28 Add amounts in column (h), lines 25 through 27. Enter here and on line 21, page 1**28****29** Add amounts in column (i), line 26. Enter here and on line 7, page 1**29****Section B - Information on Use of Vehicles**

Complete this section for vehicles used by a sole proprietor, partner, or other "more than 5% owner," or related person. If you provided vehicles to your employees, first answer the questions in Section C to see if you meet an exception to completing this section for those vehicles.

| | (a) Vehicle | (b) Vehicle | (c) Vehicle | (d) Vehicle | (e) Vehicle | (f) Vehicle |
|-----------------------------------------------------------------------------------------------------------|----------------|----------------|----------------|----------------|----------------|----------------|
| 30 Total business/investment miles driven during the year (do not include commuting miles) | | | | | | |
| 31 Total commuting miles driven during the year | | | | | | |
| 32 Total other personal (noncommuting) miles driven | | | | | | |
| 33 Total miles driven during the year. Add lines 30 through 32 | | | | | | |
| 34 Was the vehicle available for personal use during off-duty hours? | Yes | No | Yes | No | Yes | No |
| 35 Was the vehicle used primarily by a more than 5% owner or related person? | | | | | | |
| 36 Is another vehicle available for personal use? | | | | | | |

Section C - Questions for Employers Who Provide Vehicles for Use by Their Employees

Answer these questions to determine if you meet an exception to completing Section B for vehicles used by employees who are not more than 5% owners or related persons.

| | Yes | No |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|----|
| 37 Do you maintain a written policy statement that prohibits all personal use of vehicles, including commuting, by your employees? | | |
| 38 Do you maintain a written policy statement that prohibits personal use of vehicles, except commuting, by your employees? See the instructions for vehicles used by corporate officers, directors, or 1% or more owners | | |
| 39 Do you treat all use of vehicles by employees as personal use? | | |
| 40 Do you provide more than five vehicles to your employees, obtain information from your employees about the use of the vehicles, and retain the information received? | | |
| 41 Do you meet the requirements concerning qualified automobile demonstration use? | | |

Note: If your answer to 37, 38, 39, 40, or 41 is "Yes," do not complete Section B for the covered vehicles.**Part VI** Amortization

| (a) Description of costs | (b) Date amortization begins | (c) Amortizable amount | (d) Code section | (e) Amortization period or percentage | (f) Amortization for this year |
|-----------------------------|------------------------------------|------------------------------|------------------------|---------------------------------------------|--------------------------------------|
|-----------------------------|------------------------------------|------------------------------|------------------------|---------------------------------------------|--------------------------------------|

42 Amortization of costs that begins during your 2014 tax year:

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

43 Amortization of costs that began before your 2014 tax year**43****44** Total. Add amounts in column (f). See the instructions for where to report**44**