Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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.

OMB No 1545-0052

2014

Open to Public Inspection

For calendar year 2014 or tax year beginning , and ending

Name of foundation: Curchin Family Foundation

A Employer identification number: 26-1210686

Number and street (or P O box number if mail is not delivered to street address): 3515 Cedar Ridge Rd — Room/suite:

B Telephone number (see instructions): 417-782-3610

City or town, state or province, country, and ZIP or foreign postal code: Joplin MO 64804

C If exemption application is pending, check here ▶ ☐

G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change

D 1. Foreign organizations, check here ▶ ☐
2 Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐

H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐

I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ $ 147,112

J Accounting method: ☒ Cash ☐ Accrual ☐ 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 ▶ ☐

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))

	Line	Description	(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)	23,919			
	2	Check ▶ ☐ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments				
	4	Dividends and interest from securities	3,083	3,083		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	22,822			
	b	Gross sales price for all assets on line 6a 122,456				
	7	Capital gain net income (from Part IV, line 2)		22,822		
	8	Net short-term capital gain			0	
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less: Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)				
	12	**Total.** Add lines 1 through 11	49,824	25,905	0	
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc.	0			
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule) Stmt 1	150	150	150	
	c	Other professional fees (attach schedule) Stmt 2	938	938	938	
	17	Interest				
	18	Taxes (attach schedule) (see instructions) Stmt 3	227	78	78	
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (att sch)				
	24	**Total operating and administrative expenses.** Add lines 13 through 23	1,315	1,166	1,166	0
	25	Contributions, gifts, grants paid	9,000			9,000
	26	**Total expenses and disbursements.** Add lines 24 and 25	10,315	1,166	1,166	9,000
	27	Subtract line 26 from line 12:				
	a	**Excess of revenue over expenses and disbursements**	39,509			
	b	**Net investment income** (if negative, enter -0-)		24,739		
	c	**Adjusted net income** (if negative, enter -0-)			0	

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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 (a) Book Value	End of year (b) Book Value	End of year (c) Fair Market Value
Assets	1	Cash – non-interest-bearing			
	2	Savings and temporary cash investments	2,315	2,331	2,331
	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 (att schedule) ▶			
		Less allowance for doubtful accounts ▶ 0			
	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) See Stmt 4		23,919	23,599
	c	Investments – corporate bonds (attach schedule)			
	11	Investments – land, buildings, and equipment basis ▶			
		Less accumulated depreciation (attach sch) ▶			
	12	Investments – mortgage loans			
	13	Investments – other (attach schedule)			
	14	Land, buildings, and equipment basis ▶			
		Less accumulated depreciation (attach sch) ▶			
	15	Other assets (describe ▶ See Statement 5)	110,809	126,597	121,182
	16	**Total assets** (to be completed by all filers – see the instructions. Also, see page 1, item I)	113,124	152,847	147,112
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	0	
Net Assets or Fund Balances		**Foundations that follow SFAS 117, check here ▶ ☐ 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 ▶ ☒ 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	113,124	152,847	
	30	**Total net assets or fund balances** (see instructions)	113,124	152,847	
	31	**Total liabilities and net assets/fund balances** (see instructions)	113,124	152,847	

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	113,124
2	Enter amount from Part I, line 27a	2	39,509
3	Other increases not included in line 2 (itemize) ▶ See Statement 6	3	214
4	Add lines 1, 2, and 3	4	152,847
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	152,847

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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	See Attached US Bank Trust Services	P	Various	Various
b	See Attached US Bank Trust Services	P	Various	Various
c	See Attached US Bank Trust Services	P	Various	Various
d	US Bank Trust Services-LT			
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	8,660		8,515	145
b	20,029		19,339	690
c	90,570		71,780	18,790
d	3,197			3,197
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				145
b				690
c				18,790
d				3,197
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	22,822
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	145

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	5,450	126,846	0.042965
2012	8,662	121,689	0.071181
2011	6,025	115,817	0.052022
2010	4,482	87,791	0.051053
2009	2,719	54,498	0.049892

2	**Total** of line 1, column (d)	2	0.267113
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	0.053423
4	Enter the net value of noncharitable-use assets for 2014 from Part X, line 5	4	131,957
5	Multiply line 4 by line 3	5	7,050
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	247
7	Add lines 5 and 6	7	7,297
8	Enter qualifying distributions from Part XII, line 4	8	9,000

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

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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 ▶ ☐ 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 ▶ [X] and enter 1% of Part I, line 27b	1	247
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	247
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	247
6	Credits/Payments:		
a	2014 estimated tax payments and 2013 overpayment credited to 2014 — 6a		
b	Exempt foreign organizations – tax withheld at source — 6b		
c	Tax paid with application for extension of time to file (Form 8868) — 6c		
d	Backup withholding erroneously withheld — 6d		
7	Total credits and payments. Add lines 6a through 6d	7	
8	Enter any **penalty** for underpayment of estimated tax. Check here ☐ 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	247
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	
11	Enter the amount of line 10 to be: **Credited to 2015 estimated tax** ▶ Refunded ▶	11	

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)?	1b		X
	If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.			
c	Did the foundation file **Form 1120-POL** for this year?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: **(1)** On the foundation. ▶ $ ______ **(2)** On foundation managers. ▶ $ ______			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ ______			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.	2		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	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year? N/A	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T	5		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? N/A	6		
7	Did the foundation have at least $5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	7	X	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ MO			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	8b	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	9		X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10	X	

Part VII-A Statements Regarding Activities (continued)

			Yes	No
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		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)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ▶ N/A

14 The books are in care of ▶ US BANK NA Telephone no. ▶ 417-625-3264
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Located at ▶ JOPLIN MO ZIP+4 ▶ 64802-0008

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

			Yes	No
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		X
	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 ▶			

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

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

			Yes	No
1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? **(Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? N/A	1b		
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
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? N/A	1c		
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? ☐ Yes ☒ No			
	If "Yes," list the years ▶ 20 , 20 , 20 , 20			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement – see instructions.) N/A	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. ▶ 20 , 20 , 20 , 20			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2014 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969; **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2014.) N/A	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		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?	4b		X

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

					Yes	No
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 (see instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Statement 7				

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

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

Total number of other employees paid over $50,000 ▶ 0

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE."

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over $50,000 for professional services ▶		0

Part IX-A Summary of Direct Charitable Activities

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

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

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

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	133,966
b	Average of monthly cash balances	1b	0
c	Fair market value of all other assets (see instructions)	1c	0
d	**Total** (add lines 1a, b, and c)	1d	133,966
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	133,966
4	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions)	4	2,009
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	131,957
6	**Minimum investment return.** Enter 5% of line 5	6	6,598

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	6,598
2a	Tax on investment income for 2014 from Part VI, line 5 — 2a: 247		
b	Income tax for 2014. (This does not include the tax from Part VI.) — 2b:		
c	Add lines 2a and 2b	2c	247
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	6,351
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	6,351
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	6,351

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	9,000
b	Program-related investments – total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	9,000
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	247
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	8,753

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				6,351
2	Undistributed income, if any, as of the end of 2014:				
a	Enter amount for 2013 only				
b	Total for prior years: 20____ , 20____ , 20____				
3	Excess distributions carryover, if any, to 2014:				
a	From 2009				
b	From 2010				
c	From 2011				
d	From 2012 — 1,893				
e	From 2013				
f	**Total** of lines 3a through e	1,893			
4	Qualifying distributions for 2014 from Part XII, line 4: ▶ $ 9,000				
a	Applied to 2013, but not more than line 2a				
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				6,351
e	Remaining amount distributed out of corpus	2,649			
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	4,542			
b	Prior years' undistributed income. Subtract line 4b from line 2b				
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				
e	Undistributed income for 2013. Subtract line 4a from line 2a Taxable amount – see instructions				
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)				
9	**Excess distributions carryover to 2015.** Subtract lines 7 and 8 from line 6a	4,542			
10	Analysis of line 9				
a	Excess from 2010				
b	Excess from 2011				
c	Excess from 2012 — 1,893				
d	Excess from 2013				
e	Excess from 2014 — 2,649				

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 foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

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

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

1 Information Regarding Foundation Managers:

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

N/A

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.

N/A

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:

Alexander B Curchin 417-782-3610
3515 Cedar Ridge Road Joplin MO 64804

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

NONE

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:

NONE

Part XV Supplementary Information (continued)

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

Recipient Name and address (home or business)	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
a Paid during the year				
ASPIRE of Joplin PO Box 4623 Joplin MO 64803			General Support	250
Sol House 1611 Towne Drive Columbia MO 65202			General Support	500
Miracle League of Joplin PO Box 701 Joplin MO 64802			General Support	250
Pro Musica 211 S Main Joplin MO 64801			General Support	1,500
Lafayette House 1809 S Conner Joplin MO 64804			General Support	750
Spiva Center for the Arts 222 W 3rd Street Joplin MO 64801				1,000
St Philips Episcopal Church 706 Byers Ave Joplin MO 64801				3,500
United Way of SW Missouri & SE Kans 3510 E 3rd Street Joplin MO 64801				500
St Augustines Episcopal Church 1140 Wilmette Ave Wilmette IL 60091				750
Total			▶ 3a	9,000
b Approved for future payment N/A				
Total			▶ 3b	

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	3,083	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			14	3,197	19,625
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a					
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)		0		6,280	19,625

13 **Total.** Add line 12, columns (b), (d), and (e) 13 25,905

(See worksheet in line 13 instructions to verify calculations)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions.)
N/A	

DAA

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

			Yes	No
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?			
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

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements
N/A			

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

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

Alexander B. Curchin | 4/2/15 | Director

Signature of officer or trustee | Date | Title

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed
Cecil H Hull	Cecil H Hull Cecil H Hull	04/15/15	
Firm's name ▶ BAKER DAVIS RODERIQUE		PTIN	P01229738
Firm's address ▶ 920 E 15th St Joplin, MO 64804-2266		Firm's EIN ▶	43-1870827
		Phone no	417-782-0829

DAA

Schedule B
(Form 990, 990-EZ, or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.
▶ Information about Schedule B (Form 990, 990-EZ, 990-PF) and its instructions is at www.irs.gov/form990.

OMB No 1545-0047

2014

Name of the organization	Employer identification number
Curchin Family Foundation	26-1210686

Organization type (check one):

Filers of:	**Section:**
Form 990 or 990-EZ	☐ 501(c)( ) (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
	☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule.**
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions.

General Rule

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling $5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions

Special Rules

☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the $33^1/_3$ % support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** $5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and II

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than $1,000 exclusively for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions exclusively for religious, charitable, etc., purposes, but no such contributions totaled more than $1,000 If this box is checked, enter here the total contributions that were received during the year for an exclusively religious, charitable, etc., purpose Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions totaling $5,000 or more during the year ▶ $

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization: Curchin Family Foundation

Employer identification number: 26-1210686

Part I **Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	Curchin Family Foundation Cynthia W Curchin 3515 Cedar Ridge Rd Joplin MO 64804	$ 23,919	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions.)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)

Name of organization: Curchin Family Foundation

Employer identification number: 26-1210686

Part II **Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	525 Shares US Bancorp	$ 23,919	12/31/14

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

Federal Statements

Statement 1 - Form 990-PF, Part I, Line 16b - Accounting Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
Tax Preparation	$ 150	$ 150	$ 150	$
Total	$ 150	$ 150	$ 150	$ 0

Statement 2 - Form 990-PF, Part I, Line 16c - Other Professional Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
Trustee Fees	$ 838	$ 838	$ 838	$
Bank Tax Letter	100	100	100	
Total	$ 938	$ 938	$ 938	$ 0

Statement 3 - Form 990-PF, Part I, Line 18 - Taxes

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
Excise Tax	$ 149	$	$	$
Foreign Tax	78	78	78	
Total	$ 227	$ 78	$ 78	$ 0

Statement 4 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
US Bancorp	$	$ 23,919	Market	$ 23,599
Total	$ 0	$ 23,919		$ 23,599

Statement 5 - Form 990-PF, Part II, Line 15 - Other Assets

Description	Beginning of Year	End of Year	Fair Market Value
PIMCO TOTAL RETURN FD	$ 12,566	$	$
NEUBERGER BERMAN GENESIS FD	1,470		
SCOUT INTL FD	12,700		
DRIEHAUS ACTIVE INCOME FD	2,300		
ISHARES S&P PREF STOCK FD	3,793	2,213	2,288
NUVEEN INFLATION PROTECTION FD	3,895	3,511	3,779
NUVEEN INTERMEDIATE GOVT BD FD	11,851		
NUVEEN LARGE CAP GRWTH OPP FD	4,358		
NUVEEN MID CAP VALUE FD	1,515		
NUVEEN REAL ESTATE SECURITIES FD	4,598	2,260	2,779
NUVEEN SANTA BARBARA DIV GRWTH FD	17,880		
T ROWE PRICE MID CAP GRWTH FD	2,000	2,309	2,932
INV BALANCE RISK COMM STK V	3,300		
ABERDEEN FDS	11,000		
HIGHLAND LONG SHORT EQUITY FD	2,300	2,841	3,073
LAUDUS INTL MARKETMASTERS	5,000	10,987	10,172
ROBECO BOSTON PARTNERS	4,000	2,246	2,563
SPDR DJ WILSHIRE INTL	3,664		
T ROWE PRICE SC STOCK FD	2,619		
GLENMEDE SC EQUITY PORT ADV		2,028	2,010
JOHN HANCOCK FDS III		13,894	13,946
MORGAN DEMPSEY SMALL MICRO CAP		1,461	1,306
T ROWE PRICE GROWTH STOCK FD		14,838	14,440
T ROWE PRICE MID CAP VALUE FD		3,380	3,036
CAMBAIR INTL EQUITY FD		2,456	2,262
T ROWE PRICE INTL GR&INC FD		11,307	9,590
CAUSEWAY EMERGING MARKETS INST		2,460	2,233
OPPENHEIMER DEVELOPING MARKETS		9,462	8,375
BLACKROCK EMERGING MKTS LS EQTY		1,090	1,094
NEUBERGER BERMAN LONG SH INS		2,290	2,306
AMER CENT DIVERSIFED BOND INS		2,203	2,213
DOUBLELINE TOTAL RETURN BD FD		10,480	10,442
LOOMIS SAYLES GLBL BD FD		4,019	3,757
NUVEEN FUNDS CORE BD FD I		1,520	1,499
OPPENHEIMER SENIOR FLOATING RATE		2,151	2,111
TCW EMERGING MARKETS INC FD		4,071	3,733
DRIEHAUS SELECT CREDIT FD		2,034	1,828
LOOMIS SAYLES STRATEGIC ALPHA FD		1,934	1,892
SPDR DOW JONES INTL REAL ESTATE		1,060	1,247
GOLDEN SACHS COMM STRAT INS		6,092	4,276
Total	$ 110,809	$ 126,597	$ 121,182

Statement 6 - Form 990-PF, Part III, Line 3 - Other Increases

Description	Amount
Timing Difference	$ 214
Total	$ 214

Federal Statements

Statement 7 - Form 990-PF, Part VIII, Line 1 - List of Officers, Directors, Trustees, Etc.

Name and Address	Title	Average Hours	Compensation	Benefits	Expenses
ALEXANDER B CURCHIN 3515 CEDAR RIDGE ROAD JOPLIN MO 64804	DIRECTOR	0.00	0	0	0
CYNTHIA W CURCHIN 3515 CEDAR RIDGE ROAD JOPLIN MO 64804	DIRECTOR	0.00	0	0	0
JAMES E SECKER 3712 RED FOX CIRCLE JOPLIN MO 64804	DIRECTOR	0.00	0	0	0
LOUISE CURCHIN SECKER 3712 RED FOX CIRCLE JOPLIN MO 64804	DIRECTOR	0.00	0	0	0
ALEXANDER B CURCHIN IV 4205 GLEN EAGLE DRIVE COLUMBIA MO 65203	DIRECTOR	0.00	0	0	0
ANNE C CURCHIN 4205 GLEN EAGLE DRIVE COLUMBIA MO 65203	DIRECTOR	0.00	0	0	0
GRAHAM W CURCHIN 321 SOUTH SANGAMON CHICAGO IL 60607	DIRECTOR	0.00	0	0	0
JENNIFER C CURCHIN 321 SOUTH SANGAMON CHICAGO IL 60607	DIRECTOR	0.00	0	0	0
US BANK NA 402 S MAIN JOPLIN MO 64802	AGENT	0.00	0	0	0

Federal Statements

Form 990-PF, Part XV, Line 2b - Application Format and Required Contents

Description
NONE

Form 990-PF, Part XV, Line 2c - Submission Deadlines

Description
NONE

Form 990-PF, Part XV, Line 2d - Award Restrictions or Limitations

Description
NONE

2014 Tax Information Statement

Account Number: 080011590100
Recipient's Tax ID Number: XX-XXX0686
Payer's Federal ID Number: 43-6300400
Payer's State ID Number:
State: MO
Questions? (314)418-2649
☐ **Corrected** ☐ **2nd TIN notice**

Recipient's Name and Address:
CURCHIN FAMILY FOUNDATION
C/O ALEXANDER B CURCHIN
3515 CEDAR RIDGE ROAD
JOPLIN, MO 64804

Payer's Name and Address:
U.S. BANK N.A. TRUST SERVICES
PO BOX 0634
MILWAUKEE, WI 53201-0634

2014 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS is proceeds less commissions and option premiums.
For noncovered securities (Box 5 is checked) shown on this statement, cost basis information is not being reported to the IRS.
Cost or Other Basis amounts shown with a "U" are unknown or unsubstantiated.

Description of property (Box 1a)

CUSIP Number	Date Sold or Disposed (Box 1c)	Date Acquired (Box 1b)	Form 8949 Checkbox	Proceeds (Box 1d)	Cost or Other Basis (Box 1e)	Code if any (Box 1f)	Adjustments (Box 1g)	Net Gain or Loss	Federal Income Tax Withheld (Box 4)	State Tax Withheld (Box 16)
Long Term Sales Reported on 1099-B										
228.175	DRIEHAUS ACTIVE INCOME FUND									
262028855	07/17/2014	11/17/2011	E	2,448.32	2,300.00		0.00	148.32	0.00	0.00
33.0	ISHARES S P U S PREFERRED STOCK ETF									
464288687	07/17/2014	08/17/2011	E	1,310.07	1,240.80		0.00	69.27	0.00	0.00
40.247	NEUBERGER BERMAN GENESIS INSTL FD									
641233200	07/17/2014	Various	E	2,410.80	1,469.59		0.00	941.21	0.00	0.00
749.723	NUVEEN SANTA BARBARA DIV GROWTH FD I									
67065W639	07/17/2014	Various	E	26,082.84	17,879.84		0.00	8,203.00	0.00	0.00
123.917	NUVEEN REAL ESTATE SECS I									
670678507	07/17/2014	08/17/2011	E	2,887.27	2,305.21		0.00	582.06	0.00	0.00
96.267	NUVEEN MID CAP VALUE FUND CL I									
670678663	07/17/2014	12/31/2008	E	3,295.22	1,515.24		0.00	1,779.98	0.00	0.00
1025.417	NUVEEN INTERMEDIATE GOVT BD FD CL I									
670690379	07/17/2014	12/31/2008	E	9,044.18	8,236.95		0.00	807.23	0.00	0.00

This is important tax information and is being furnished to the Internal Revenue Service (except as indicated). If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported. For noncovered securities shown on this statement, cost basis information is not being reported to the Internal Revenue Service. The taxpayer is ultimately responsible for the accuracy of their own tax return.

2014 Tax Information Statement

Payer's Name and Address:
U.S. BANK N.A. TRUST SERVICES
PO BOX 0634
MILWAUKEE, WI 53201-0634

Account Number: 080011590100
Recipient's Tax ID Number: XX-XXX0686
Payer's Federal ID Number: 43-6300400
Payer's State ID Number:
State: MO
Questions? (314)418-2649

☐ **Corrected** ☐ **2nd TIN notice**

Recipient's Name and Address:
CURCHIN FAMILY FOUNDATION
C/O ALEXANDER B CURCHIN
3515 CEDAR RIDGE ROAD
JOPLIN, MO 64804

Reported to the IRS is proceeds less commissions and option premiums.
For noncovered securities (Box 5 is checked) shown on this statement, cost basis information is not being reported to the IRS.
Cost or Other Basis amounts shown with a "U" are unknown or unsubstantiated.

Description of property (Box 1a) / CUSIP Number	Date Sold or Disposed (Box 1c)	Date Acquired (Box 1b)	Form 8949 Checkbox	Proceeds (Box 1d)	Cost or Other Basis (Box 1e)	Code if any (Box 1f)	Adjustments (Box 1g)	Net Gain or Loss	Federal Income Tax Withheld (Box 4)	State Tax Withheld (Box 16)
148.385 NUVEEN LARGE CAP GRWTH OPP CL I										
670690692	07/17/2014	Various	E	6,100.11	4,358.01		0.00	1,742.10	0.00	0.00
1142.326 P I M C O FDS TOTAL RETURN FD										
693390700	07/17/2014	11/16/2009	E	12,519.89	12,538.86		0.00	-18.97	0.00	0.00
70.0 SPDR DOW JONES INTERNATIONAL ETF										
78463X863	07/17/2014	08/17/2011	E	3,111.54	2,604.00		0.00	507.54	0.00	0.00
432.335 SCOUT INTERNATIONAL FUND										
81063U503	07/17/2014	Various	E	16,165.01	12,700.00		0.00	3,465.01	0.00	0.00
9.0 ISHARES S P U S PREFERRED STOCK ETF										
464288687	10/28/2014	08/17/2011	E	356.66	338.40		0.00	18.26	0.00	0.00
37.48 NUVEEN INFLATION PRO SEC CL I										
670690387	10/28/2014	11/16/2009	E	417.90	383.42		0.00	34.48	0.00	0.00
448.436 NUVEEN INTERMEDIATE GOVT BD FD CL I										
670690379	11/21/2014	12/31/2008	E	3,964.17	3,602.18		0.00	361.99	0.00	0.00
5.582 T ROWE PRICE MID CAP GROWTH FD #64										
779556109	11/21/2014	08/17/2011	E	455.99	307.73		0.00	148.26	0.00	0.00
Total Long Term Sales Reported on 1099-B				**90,569.97**	**71,780.23**		**0.00**	**18,789.74**	**0.00**	**0.00**

Report on Form 8949, Part II, with Box E checked

This is important tax information and is being furnished to the Internal Revenue Service (except as indicated). If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported. For noncovered securities shown on this statement, cost basis information is not being reported to the Internal Revenue Service. The taxpayer is ultimately

TEP231808_52_1410 16 of 28

2014 Tax Information Statement

Payer's Name and Address:
U.S. BANK N.A. TRUST SERVICES
PO BOX 0634
MILWAUKEE, WI 53201-0634

Account Number: 080011590100
Recipient's Tax ID Number: XX-XXX0686
Payer's Federal ID Number: 43-6300400
Payer's State ID Number:
State: MO
Questions? (314)418-2649

☐ Corrected ☐ 2nd TIN notice

Recipient's Name and Address:
CURCHIN FAMILY FOUNDATION
C/O ALEXANDER B CURCHIN
3515 CEDAR RIDGE ROAD
JOPLIN, MO 64804

2014 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS is proceeds less commissions and option premiums.
Covered (Box 5 is not checked)

Description of property (Box 1a)

Cusip Number	Date Sold or Disposed (Box 1c)	Date Acquired (Box 1b)	Form 8949 Checkbox	Proceeds (Box 1d)	Cost or Other Basis (Box 1e)	Code if any (Box 1f)	Adjustments (Box 1g)	Net Gain or Loss	Federal Income Tax Withheld (Box 4)	State Tax Withheld (Box 16)
Short Term Sales Reported on 1099-B										
22.989	OPPENHEIMER DEVELOPING MARKETS I									
683974604	07/22/2014	07/17/2014	A	931.05	912.89		0.00	18.16	0.00	0.00
102.652	DOUBLELINE TOTAL RET BD I									
258620103	10/28/2014	07/17/2014	A	1,131.23	1,130.20		0.00	1.03	0.00	0.00
51.997	JOHN HANCOCK FDS III DISCPLN V I									
47803U640	10/28/2014	07/17/2014	A	990.54	982.74		0.00	7.80	0.00	0.00
20.798	T ROWE PRICE GROWTH STOCK #40									
741479109	10/28/2014	07/17/2014	A	1,161.98	1,110.20		0.00	51.78	0.00	0.00
48.415	DRIEHAUS SELECT CREDIT FUND									
262028848	11/21/2014	07/17/2014	A	467.20	492.86		0.00	-25.66	0.00	0.00
72.647	JOHN HANCOCK FDS III DISCPLN V I									
47803U640	11/21/2014	07/17/2014	A	1,441.32	1,373.03		0.00	68.29	0.00	0.00
58.344	LOOMIS SAYLES STRATEGIC ALPHA FUND Y									
63872T620	11/21/2014	07/17/2014	A	590.44	593.36		0.00	-2.92	0.00	0.00
79.274	NEUBERGER BERMAN LONG SH INS									
64128R608	11/21/2014	07/17/2014	A	1,039.28	1,021.05		0.00	18.23	0.00	0.00

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2014 Tax Information Statement

Payer's Name and Address:
U.S. BANK N.A. TRUST SERVICES
PO BOX 0634
MILWAUKEE, WI 53201-0634

Account Number:	080011590100
Recipient's Tax ID Number:	XX-XXX0686
Payer's Federal ID Number:	43-6300400
Payer's State ID Number:	
State:	MO
Questions?	(314)418-2649

☐ **Corrected** ☐ **2nd TIN notice**

Recipient's Name and Address:
CURCHIN FAMILY FOUNDATION
C/O ALEXANDER B CURCHIN
3515 CEDAR RIDGE ROAD
JOPLIN, MO 64804

2014 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS is proceeds less commissions and option premiums.
Covered (Box 5 is not checked)

Description of property (Box 1a) / Cusip Number	Date Sold or Disposed (Box 1c)	Date Acquired (Box 1b)	Form 8949 Checkbox	Proceeds (Box 1d)	Cost or Other Basis (Box 1e)	Code if any (Box 1f)	Adjustments (Box 1g)	Net Gain or Loss	Federal Income Tax Withheld (Box 4)	State Tax Withheld (Box 16)
6.549 T ROWE PRICE GROWTH STOCK #40										
741479109	11/21/2014	07/17/2014	A	377.16	349.59		0.00	27.57	0.00	0.00
39.589 MORGAN DEMPSEY SMALL MICRO CAP VALUE										
89833W477	11/21/2014	07/17/2014	A	530.10	549.10		0.00	-19.00	0.00	0.00
Total Short Term Sales Reported on 1099-B				**8,660.30**	**8,515.02**		**0.00**	**145.28**	**0.00**	**0.00**

Report on Form 8949, Part I, with Box A checked

Long Term Sales Reported on 1099-B

Description of property (Box 1a) / Cusip Number	Date Sold or Disposed (Box 1c)	Date Acquired (Box 1b)	Form 8949 Checkbox	Proceeds (Box 1d)	Cost or Other Basis (Box 1e)	Code if any (Box 1f)	Adjustments (Box 1g)	Net Gain or Loss	Federal Income Tax Withheld (Box 4)	State Tax Withheld (Box 16)
714.286 ABERDEEN FDS EMRGN										
003021714	07/17/2014	05/31/2013	D	11,157.15	11,000.00		0.00	157.15	0.00	0.00
357.918 INV BALANCE RISK COMM STR Y										
00888Y508	07/17/2014	05/29/2013	D	3,217.68	3,300.00		0.00	-82.32	0.00	0.00
101.745 ROBECO BOSTON PARTNERS L S RSRCH										
74925K581	07/17/2014	05/31/2013	D	1,525.16	1,335.91		0.00	189.25	0.00	0.00
66.366 T ROWE PRICE SC STOCK										
779572106	07/17/2014	05/31/2013	D	2,942.67	2,618.79		0.00	323.88	0.00	0.00
57.804 ROBECO BOSTON PARTNERS L S RSRCH										
74925K581	10/28/2014	05/31/2013	D	861.86	758.97		0.00	102.89	0.00	0.00

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2014 Tax Information Statement

Payer's Name and Address:
U.S. BANK N.A. TRUST SERVICES
PO BOX 0634
MILWAUKEE, WI 53201-0634

Account Number:	**080011590100**
Recipient's Tax ID Number:	**XX-XXX0686**
Payer's Federal ID Number:	**43-6300400**
Payer's State ID Number:	
State:	**MO**
Questions?	**(314)418-2649**

☐ **Corrected** ☐ **2nd TIN notice**

Recipient's Name and Address:
CURCHIN FAMILY FOUNDATION
C/O ALEXANDER B CURCHIN
3515 CEDAR RIDGE ROAD
JOPLIN, MO 64804

2014 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS is proceeds less commissions and option premiums.
Covered (Box 5 is not checked)

Description of property *(Box 1a)*

Cusip Number	Date Sold or Disposed *(Box 1c)*	Date Acquired *(Box 1b)*	Form 8949 Checkbox	Proceeds *(Box 1d)*	Cost or Other Basis *(Box 1e)*	Code if any *(Box 1f)*	Adjustments *(Box 1g)*	Net Gain or Loss	Federal Income Tax Withheld *(Box 4)*	State Tax Withheld *(Box 16)*
14.177	LAUDUS INTERNATIONAL MARKETMASTERS									
808509640	11/21/2014	11/01/2013	D	324.94	333.73	W	8.79	0.00	0.00	0.00
Total Long Term Sales Reported on 1099-B				**20,029.46**	**19,347.40**		**8.79**	**690.85**	**0.00**	**0.00**

Report on Form 8949, Part II, with Box D checked

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