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Form **990-PF**Department of the Treasury  
Internal Revenue Service**Return of Private Foundation**

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

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Information about Form 990-PF and its separate instructions is at [www.irs.gov/form990pf](http://www.irs.gov/form990pf).

OMB No 1545-0052

**2014**

Open to Public Inspection

For calendar year 2014 or tax year beginning

, 2014, and ending

, 20

Name of foundation <b>Aloysius Foundation</b>		A Employer identification number <b>26-1600193</b>						
Number and street (or P O box number if mail is not delivered to street address) <b>4200 IDS Center, 80 South 8th Street</b>		B Telephone number (see instructions) <b>612-371-3917</b>						
City or town, state or province, country, and ZIP or foreign postal code <b>Minneapolis, MN 55402</b>		C If exemption application is pending, check here <input type="checkbox"/>						
G Check all that apply: <table border="0"> <tr> <td><input type="checkbox"/> Initial return</td> <td><input type="checkbox"/> Initial return of a former public charity</td> </tr> <tr> <td><input type="checkbox"/> Final return</td> <td><input type="checkbox"/> Amended return</td> </tr> <tr> <td><input type="checkbox"/> Address change</td> <td><input type="checkbox"/> Name change</td> </tr> </table>		<input type="checkbox"/> Initial return	<input type="checkbox"/> Initial return of a former public charity	<input type="checkbox"/> Final return	<input type="checkbox"/> Amended return	<input type="checkbox"/> Address change	<input type="checkbox"/> Name change	D 1 Foreign organizations, check here <input type="checkbox"/> 2 Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
<input type="checkbox"/> Initial return	<input type="checkbox"/> Initial return of a former public charity							
<input type="checkbox"/> Final return	<input type="checkbox"/> Amended return							
<input type="checkbox"/> Address change	<input type="checkbox"/> Name change							
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) <b>\$ 2,405,866.97</b>		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>						
J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____								

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1	Contributions, gifts, grants, etc., received (attach schedule)				
2	Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
3	Interest on savings and temporary cash investments	3.05	3.05		
4	Dividends and interest from securities	54,498.74	54,498.74		
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	24,759.38			
b	Gross sales price for all assets on line 6a	200,528.03			
7	Capital gain net income (from Part IV, line 2)		24,759.38		
8	Net short-term capital gain				
9	Income modifications				
10a	Gross sales less returns and allowances				
b	Less Cost of goods sold				
c	Gross profit or (loss) (attach schedule)				
11	Other income (attach schedule)				
12	Total. Add lines 1 through 11	79,261.17	79,261.17	N/A	
13	Compensation of officers, directors, trustees, etc.				
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees (attach schedule)	3,683.86	368.39		3,315.47
b	Accounting fees (attach schedule)				
c	Other professional fees (attach schedule)				
17	Interest				
18	Taxes (attach schedule) (see instructions)				
19	Depreciation (attach schedule) and depletion				
20	Occupancy				
21	Travel, conferences, and meetings				
22	Printing and publications				
23	Other expenses (attach schedule)				
24	Total operating and administrative expenses. Add lines 13 through 23	3,683.86	368.39	N/A	3,315.47
25	Contributions, gifts, grants paid	113,050.00			113,050.00
26	Total expenses and disbursements. Add lines 24 and 25	116,733.86	368.39	N/A	116,365.47
27	Subtract line 26 from line 12				
a	Excess of revenue over expenses and disbursements	-37,472.69			
b	Net investment income (if negative, enter -0-)		78,892.78		
c	Adjusted net income (if negative, enter -0-)			N/A	

SCANNED MAY 15 2015

Revenue

Operating and Administrative Expenses

914

7

<b>Part II Balance Sheets</b>		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>Assets</b>	1	Cash - non-interest-bearing . . . . .				
	2	Savings and temporary cash investments . . . . .	500.04	83,303.09	83,303.09	
	3	Accounts receivable ▶ Less: allowance for doubtful accounts ▶				
	4	Pledges receivable ▶ Less: allowance for doubtful accounts ▶				
	5	Grants receivable . . . . .				
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . .				
	7	Other notes and loans receivable (attach schedule) ▶ Less: allowance for doubtful accounts ▶				
	8	Inventories for sale or use . . . . .				
	9	Prepaid expenses and deferred charges . . . . .				
	10a	Investments - U S and state government obligations (attach schedule) . . . . .				
	b	Investments - corporate stock (attach schedule) . . . . .	2,234,753.98	2,114,478.24	2,322,563.88	
	c	Investments - corporate bonds (attach schedule) . . . . .				
	11	Investments - land, buildings, and equipment basis ▶ Less: accumulated depreciation (attach schedule) ▶				
	12	Investments - mortgage loans . . . . .				
	13	Investments - other (attach schedule) . . . . .				
	14	Land, buildings, and equipment basis ▶ Less: accumulated depreciation (attach schedule) ▶				
15	Other assets (describe ▶ )					
16	<b>Total assets</b> (to be completed by all filers - see the instructions Also, see page 1, item I) . . . . .	2,235,254.02	2,197,781.33	2,405,866.97		
<b>Liabilities</b>	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	<b>Total liabilities</b> (add lines 17 through 22) . . . . .	0.00	0.00			
<b>Net Assets or Fund Balances</b>	<b>Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.</b>					
	24	Unrestricted . . . . .				
	25	Temporarily restricted . . . . .				
	26	Permanently restricted . . . . .				
	<b>Foundations that do not follow SFAS 117, . . . ▶ <input type="checkbox"/> check here and complete lines 27 through 31.</b>					
	27	Capital stock, trust principal, or current funds . . . . .	2,235,254.02	2,197,781.33		
	28	Paid-in or capital surplus, or land, bldg, and equipment fund . . . . .				
	29	Retained earnings, accumulated income, endowment, or other funds . . . . .				
30	<b>Total net assets or fund balances</b> (see instructions) . . . . .	2,235,254.02	2,197,781.33			
31	<b>Total liabilities and net assets/fund balances</b> (see instructions) . . . . .	2,235,254.02	2,197,781.33			

**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	2,235,254.02
2	Enter amount from Part I, line 27a . . . . .	2	-37,472.69
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3 . . . . .	4	2,197,781.33
5	Decreases not included in line 2 (itemize) ▶	5	
6	<b>Total net assets or fund balances at end of year</b> (line 4 minus line 5) - Part II, column (b), line 30 . . . . .	6	2,197,781.33

Form **990-PF** (2014)

( See Attached Schedules for Lines 2 and 10b )

**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.)
<b>1a See Attached Schedule</b>				P	Various	Various
<b>b Long Term Capital Gain Distribution</b>					N/A	N/A
<b>c</b>						
<b>d</b>						
<b>e</b>						
(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)			
<b>a</b> 199,533.86	0.00	175,768.65	23,765.21			
<b>b</b> 994.17	0.00	0.00	994.17			
<b>c</b>						
<b>d</b>						
<b>e</b>						
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))			
<b>a</b> 0.00	0.00	0.00	23,765.21			
<b>b</b> 0.00	0.00	0.00	994.17			
<b>c</b>						
<b>d</b>						
<b>e</b>						
<b>2 Capital gain net income or (net capital loss)</b>				2	24,759.38	
<div style="display: flex; align-items: center;"> <div style="border-left: 1px solid black; padding-left: 5px; margin-right: 5px;">           If gain, also enter in Part I, line 7            If (loss), enter -0- in Part I, line 7         </div> </div>						
<b>3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)</b>				3	0.00	
<div style="display: flex; align-items: center;"> <div style="border-left: 1px solid black; padding-left: 5px; margin-right: 5px;">           If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in            Part I, line 8         </div> </div>						

**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	113,087.60	2,337,998.97	0.0484		
2012	107,641.37	2,240,637.61	0.0480		
2011	102,652.75	2,219,246.37	0.0463		
2010	94,082.42	2,100,842.47	0.0448		
2009	92,074.77	1,817,870.69	0.0506		
<b>2 Total of line 1, column (d)</b>				2	0.2381
<b>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</b>				3	0.0476
<b>4 Enter the net value of noncharitable-use assets for 2014 from Part X, line 5</b>				4	2,389,201.22
<b>5 Multiply line 4 by line 3</b>				5	113,725.98
<b>6 Enter 1% of net investment income (1% of Part I, line 27b)</b>				6	788.93
<b>7 Add lines 5 and 6</b>				7	114,514.91
<b>8 Enter qualifying distributions from Part XII, line 4</b>				8	116,365.47

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	788.93
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	0.00
3 Add lines 1 and 2 . . . . .		3	788.93
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-) . . . . .		4	0.00
5 <b>Tax based on investment income.</b> Subtract line 4 from line 3 If zero or less, enter -0- . . . . .		5	788.93
6 Credits/Payments			
a 2014 estimated tax payments and 2013 overpayment credited to 2014 . . . . .	6a	892.58	
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	892.58	
8 Enter any <b>penalty</b> for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached . . . . .	8	0.00	
9 <b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b> . . . . .	9	0.00	
10 <b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b> . . . . .	10	103.65	
11 Enter the amount of line 10 to be <b>Credited to 2015 estimated tax</b> ▶ 103.65 <b>Refunded</b> ▶	11	0.00	

**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 <b>Form 1120-POL</b> 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 ▶ \$ 0.00 (2) On foundation managers ▶ \$ 0.00		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ \$ 0.00		
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? . . . . . N/A		x
b If "Yes," has it filed a tax return on <b>Form 990-T</b> 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) ▶ <u>Minnesota</u>		
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

**Part VII-A Statements Regarding Activities (continued)**

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		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? Website address <u>                    </u>	13	x	
14	The books are in care of <u>Keith Kostuch</u> Telephone no <u>952-303-6663</u> Located at <u>4511 Lakeview Drive, Edina, MN</u> ZIP+4 <u>55424</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here <u>N/A</u> and enter the amount of tax-exempt interest received or accrued during the year <u>15</u>			
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 90-221) If "Yes," enter the name of the foreign country <u>                    </u>	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
<b>1a</b> 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>b</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)?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
Organizations relying on a current notice regarding disaster assistance check here <u>N/A</u>		
<b>c</b> 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
<b>2</b> 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))		
<b>a</b> 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 <u>N/A</u> <u>N/A</u> <u>N/A</u> <u>N/A</u>	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
<b>b</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)	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
<b>c</b> If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here <u>N/A</u> <u>N/A</u> <u>N/A</u> <u>N/A</u>		
<b>3a</b> 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>b</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)	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
<b>4a</b> Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		x
<b>b</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

**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)? ☐ Yes ☒ No

Organizations relying on a current notice regarding disaster assistance check here ☐ ☒ N/A

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

If "Yes," attach the statement required by Regulations section 53.4945-5(d)

**6a** Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No

**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? ☐ Yes ☒ No

If "Yes" to 6b, file Form 8870

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

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Erna Kostuch	Dir/Pres 1+-	0.00	0.00	0.00
Thomas Kostuch	Dir 1+-	0.00	0.00	0.00
Keith Kostuch	Dir/Treas 1+-	0.00	0.00	0.00
Lydia Kostuch	Dir 1+-	0.00	0.00	0.00
Hannah Kostuch	Dir/Sec 1+-	0.00	0.00	0.00
William Kostuch	Dir 1+-	0.00	0.00	0.00
( See attached Supplemental Information Schedule for addresses )				

**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. ☐ 0.00

**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		0.00

**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 None	
2	
3	
4	
	0.00

**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 None	
2	
All other program-related investments See instructions	
3	
	0.00
Total. Add lines 1 through 3	0.00

Form 990-PF (2014)



**Part X Minimum Investment Return** (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities	1a	2,391,076.00
b	Average of monthly cash balances	1b	34,509.00
c	Fair market value of all other assets (see instructions)	1c	0.00
d	<b>Total</b> (add lines 1a, b, and c)	1d	2,425,585.00
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.00
2	Acquisition indebtedness applicable to line 1 assets	2	0.00
3	Subtract line 2 from line 1d	3	2,425,585.00
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	36,383.78
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2,389,201.22
6	<b>Minimum investment return.</b> Enter 5% of line 5	6	119,460.06

**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	119,460.06
2a	Tax on investment income for 2014 from Part VI, line 5	2a	788.93
b	Income tax for 2014 (This does not include the tax from Part VI)	2b	0.00
c	Add lines 2a and 2b	2c	788.93
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	118,671.13
4	Recoveries of amounts treated as qualifying distributions	4	0.00
5	Add lines 3 and 4	5	118,671.13
6	Deduction from distributable amount (see instructions)	6	0.00
7	<b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	118,671.13

**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	116,365.47
b	Program-related investments - total from Part IX-B	1b	0.00
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	0.00
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	0.00
b	Cash distribution test (attach the required schedule)	3b	0.00
4	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	116,365.47
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	788.93
6	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	6	115,576.54

**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
<b>1</b> Distributable amount for 2014 from Part XI, line 7 . . . . .				118,671.13
<b>2</b> Undistributed income, if any, as of the end of 2014				
<b>a</b> Enter amount for 2013 only . . . . .			110,355.76	
<b>b</b> Total for prior years 20____, 20____, 20____ . . . . .		0.00		
<b>3</b> Excess distributions carryover, if any, to 2014				
<b>a</b> From 2009 . . . . .	0.00			
<b>b</b> From 2010 . . . . .	0.00			
<b>c</b> From 2011 . . . . .	0.00			
<b>d</b> From 2012 . . . . .	0.00			
<b>e</b> From 2013 . . . . .	0.00			
<b>f</b> Total of lines 3a through e . . . . .	0.00			
<b>4</b> Qualifying distributions for 2014 from Part XII, line 4 ▶ \$ <u>116,365.47</u>				
<b>a</b> Applied to 2013, but not more than line 2a . . . . .			110,355.76	
<b>b</b> Applied to undistributed income of prior years (Election required - see instructions) . . . . .		0.00		
<b>c</b> Treated as distributions out of corpus (Election required - see instructions) . . . . .	0.00			
<b>d</b> Applied to 2014 distributable amount . . . . .				6,009.71
<b>e</b> Remaining amount distributed out of corpus . . . . .	0.00			
<b>5</b> Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.00			0.00
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5 . . . . .	0.00			
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b . . . . .		0.00		
<b>c</b> 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 . . . . .		0.00		
<b>d</b> Subtract line 6c from line 6b. Taxable amount - see instructions . . . . .		0.00		
<b>e</b> Undistributed income for 2013 Subtract line 4a from line 2a Taxable amount - see instructions . . . . .			0.00	
<b>f</b> Undistributed income for 2014 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015 . . . . .				112,661.42
<b>7</b> 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) . . . . .	0.00			
<b>8</b> Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions) . . . . .	0.00			
<b>9</b> Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a . . . . .	0.00			
<b>10</b> Analysis of line 9				
<b>a</b> Excess from 2010 . . . . .	0.00			
<b>b</b> Excess from 2011 . . . . .	0.00			
<b>c</b> Excess from 2012 . . . . .	0.00			
<b>d</b> Excess from 2013 . . . . .	0.00			
<b>e</b> Excess from 2014 . . . . .	0.00			

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

**1 a** If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2014, enter the date of the ruling ▶ N/A

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

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

Keith and Erna Kostuch, substantial contributors

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

None

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

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

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

N/A

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

N/A

**c** Any submission deadlines.

N/A

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

N/A

JSA

**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
<b>a</b> Paid during the year See Attached Schedule	N/A	Exempt	General Support & Capital Campaigns	113,050.00
<b>Total</b> . . . . . ▶ <b>3a</b>				113,050.00
<b>b</b> Approved for future payment None				
<b>Total</b> . . . . . ▶ <b>3b</b>				0.00

## Enter gross amounts unless otherwise indicated

(See worksheet in line 13 instructions to verify calculations )

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 )
▼	

[illegible]

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

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

**Sign  
Here**

Signature of officer completing

2 April 2015

Director/Treasurer  
Title

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


**Paid  
Preparer  
Use Only**

---

Print/Type preparer's name

Ann M. Novacheck

Preparer's signature \_\_\_\_\_

Preparer's signature 

Date \_\_\_\_\_

4/28/12

Check ☐ if self-employed

PTIN

P00848711

Firm's name ► Lindquist & Vennum LLP

Firm's EIN ► 41-0658379

Firm's address ▶ 4200 IDS Center, 80 South 8th Street  
Minneapolis, MN 55402

Phone no 612-371-3917

Form **990-PF** (2014)

# PRINCIPAL BALANCE ON HAND

Page 1

Aloysius Foundation  
As of 12/31/2014

	Current Value	Carrying Value
Money Market Accounts		
The Vanguard Group Money Fund Account	\$83,303 09	\$83,303 09
Mutual Funds		
Vanguard Inflation-Protected Securities Fund Admiral Shares 32,522.567 Units	841,358 81	779,320.09
Vanguard Total Stock Market Index Fund Admiral Shares 17,787 664 Units	917,843 46	635,473 12
Vanguard Total International Stock Index Fund Admiral Fund (New) 21,667 755 Units	563,361 61	699,685.03
PRINCIPAL BALANCE ON HAND	<u>\$2,405,866 97</u>	<u>\$2,197,781.33</u>

## Supplemental Information

EIN 26-1600183  
2014 Form 990-PF  
Part II, Page 2, Balance Sheets

# PRINCIPAL BALANCE ON HAND

Page 1

Aloysius Foundation  
As of 12/31/2013

	Current Value	Carrying Value
Money Market Accounts		
The Vanguard Group Money Fund Account	\$ 500 04	\$ 500 04
Mutual Funds		
Vanguard Inflation-Protected Securities Fund Admiral Shares 37,525 945 Units	955,785 83	898,626.64
Vanguard Total Stock Market Index Fund Admiral Shares 18,270.852 Units	853,066 10	648,427.50
Vanguard Total International Stock Index Fund Admiral Fund (New) 21,193.334 Units	687,699.84	687,699 84
PRINCIPAL BALANCE ON HAND	<u>\$2,497,051 81</u>	<u>\$2,235,254 02</u>

Supplemental Information

EIN. 26-1600183  
2014 Form 990-PF  
Part II, Page 2, Balance Sheets



# Long-Term Capital Gains and Losses

Page 1

Aloysius Foundation  
For Period 01/01/2014 Through 12/31/2014

Description of property	Date acquired	Date sold	Sales price	Cost or other basis	Gain or (loss)
Vanguard Inflation-Protected Securities Fund Admiral Share 38 506 units	12/24/2007	02/11/2014	1,000 00	929 66	70 34
Vanguard Inflation-Protected Securities Fund Admiral Share 57 759 units	12/24/2007	02/11/2014	1 500 00	1 394 48	105 52
Vanguard Inflation-Protected Securities Fund Admiral Share 38 58 units	12/24/2007	02/12/2014	1,000.00	931 44	68 56
Vanguard Inflation-Protected Securities Fund Admiral Share 1,079 924 units	12/24/2007	02/27/2014	28,000 00	26,072 74	1,927 26
Vanguard Total International Stock Index Fund Admiral (New) 205 874 units	03/02/2011	06/09/2014	6,000 00	6,845 24	(845 24)
Vanguard Total Stock Market Index Fund 321 106 units	12/24/2007	06/09/2014	15,500 00	11,573.66	3,926 34
Vanguard Inflation-Protected Securities Fund Admiral Share 1,744 352 units	12/24/2007	06/30/2014	46,033.86	42,114 10	3,919 76
Vanguard Total Stock Market Index Fund 198 491 units	12/24/2007	08/25/2014	10,000 00	7 154 24	2,845 76
Vanguard Inflation-Protected Securities Fund Admiral Share 1,536 174 units	12/24/2007	08/31/2014	41,250 00	37,088 04	4,161 96
Vanguard Inflation-Protected Securities Fund Admiral Share 133.333 units	12/24/2007	09/23/2014	3,500 00	3,219 08	280 92
Vanguard Total Stock Market Index Fund 293 083 units	12/24/2007	11/17/2014	15,000.00	10,563 63	4,436 37
Vanguard Inflation-Protected Securities Fund Admiral Share 1,154 877 units	12/24/2007	11/17/2014	30,750 00	27,882 34	2,867 66
Totals			199,533 86	175,768 65	23,765 21

## Supplemental Information

EIN 26-1600183  
2014 Form 990-PF  
Part IV - Line 1a

**Aloysius Foundation**  
**EIN: 26-1600193**  
**2014 Form 990-PF**

**Supplemental Information**

**Part I, Line 16a – Legal Fees and Expenses**

Lindquist & Vennum LLP  
4200 IDS Center  
80 South 8<sup>th</sup> Street  
Minneapolis, MN 55402

\$3,683.86

**Part VIII, Line 1 – Information About Officers and Directors**

**Addresses:**

Erna Kostuch  
Thomas Kostuch  
Keith Kostuch  
Lydia Kostuch  
William Kostuch  
Hannah Kostuch  
4511 Lakeview Drive  
Edina, MN 55424

# 2014 Aloysius Foundation Grants

Category	Date	Organization	Amount	check #	Address street	city	state	zip	confirm
<b>Religious</b>									
	2/4/2014	Catholic Services Appeal	1,500 00		1341 328 Kellogg Boulevard We	St Paul	MN	55102	r
	2/4/2014	Priestly Fraternity of St Peter - Our Lady of Guadalupe Ser	1,000 00		1335 Griffin Rd, PO Box 196	Elmhurst	PA	18416	r
	2/4/2014	St Agnes (capital campaign)	20,000 00		1333 535 Thomas Avenue	St Paul	MN	55103	r
	4/7/2014	Aid to the Church in Need	2,000 00		1346 725 Leonard Street PO Bo	Brooklyn	NY	11222	r
	4/7/2014	Foundation for the Annuciation Monastery of Clear Creek	500 00		1348 5804 W Monastery Rd	Hulbert	OK	74441	r
	4/7/2014	Corpus Christi Monastery (Rockford nuns)	2,500 00		1350 2111 S Main St	Rockford	IL	61102	r
	5/29/2014	All Saints Parish	3,000 00		1353 435 Fourth St NE	Minneapolis	MN	55413	
	5/29/2014	Canons Regular of St John Cantius	2,500 00		1354 825 N Carpenter St	Chicago	IL	60642	r
	5/29/2014	St Joseph Foundation	600 00		127 11107 Wurzbach Road, Su	San Antonio	TX	78230-21	r
	5/29/2014	Coalition in Support of Ecclesia Dei	600 00		128 PO Box 2071	Glenview	IL	60025	r
	8/11/2014	St Agnes (general support)	26,000 00		1357 535 Thomas Avenue	St Paul	MN	55103	r
	11/6/2014	Corpus Christi Monastery (Rockford nuns)	1,000 00		132 2111 S Main St	Rockford	IL	61102	r
	9/11/2014	Twin Cities Catholic Chorale	3,500 00		1358 PO Box 4234	St Paul	MN	55104	r
		sub- total	64,700 00						
<b>Educational/Cultural</b>									
	2/4/2014	Thomas Aquinas College	3,000 00		1337 10000 North Ojai Rd	Santa Paula	CA	93060	r
	2/4/2014	MCCL Education Fund	1,500 00		1340 4249 Nicollet Ave	Minneapolis	MN	55402	r
	4/8/2014	University of Chicago - College	2,500 00		1349 401 N Michigan Ave, #900	Chicago	IL	60611	r
	4/7/2014	Stevens Point Area Catholic Schools	500 00		1347 1004 First St	Stevens Point	WI	54481	r
	8/11/2014	Angelica Cantanti Youth Choirs	1,000 00		131 1800 W Old Shakapee Rd	Bloomington	MN	55431	r
	8/11/2014	KBEM-FM (Jazz 88)/Minneapolis Public Schools	250 00		1356 1555 James Ave N	Minneapolis	MN	55411	r
	11/6/2014	Home School Foundation	1,000 00		134 PO Box 1152	Purcellville	VA	20134	r
	11/6/2014	MN Opera	750 00		135 620 North First St	Minneapolis	MN	55401	r
	11/6/2014	MN Landscape Arboretum Foundation	250 00		133 3675 Arboretum Dr	Chaska	MN	55318	r
		sub-total	10,750 00						
<b>Human Service</b>									
	2/4/2014	CNEWA	1,500 00		1339 1011 First Avenue	New York	NY	10022	r
	4/7/2014	Twin Cities Rise!	7,000 00		1343 800 Washington Ave N, Su	Minneapolis	MN	55401	r
	4/7/2014	Pro-Life Across America	1,000 00		1345 PO Box 18669	Minneapolis	MN	55418	r
	5/29/2014	Second Harvest Heartland	7,000 00		1352 1140 Gervais Ave	St Paul	MN	55109	r
	5/29/2014	Doctors without Borders USA	1,250 00		1355 333 Seventh Ave, 2nd fl	NYC	NY	10001	r
	5/29/2014	Christian Solidarity Worldwide	500 00		126 PO Box 50608	Casper	WY	82605	r
	8/11/2014	Holyland Christian Ecumenical Foundation	1,000 00		129 6935 Wisconsin Ave #214	Bethesda	MD	20815	r
	11/6/2014	Room to Read	500 00		136 111 Sutter Street, 16th floo	San Francisco	CA	94104	r
	11/6/2014	Salvation Army - Twin Cities	3,000 00		1360 2445 Prior Ave N	Roseville	MN	55113	r
	11/6/2014	VEAP	1,500 00		1361 9728 Irving Ave S	Bloomington	MN	55431	r
	11/6/2014	Doctors without Borders USA	1,250 00		1359 333 Seventh Ave, 2nd fl	NYC	NY	10001	r
		sub-total	25,500 00						
<b>American Democracy, Traditional Values and Free Markets</b>									
	2/4/2014	Institute for Justice (MN)	1,000 00		1336 901 N Glebe Road, #900	Arlington	VA	22203	r
	2/4/2014	National Right to Work Legal Defense Fund	1,000 00		1338 8001 Braddock Road	Springfield	VA	22151	r
	2/4/2014	Citizens Against Government Waste	1,000 00		1334 1301 Pennsylvania Ave NV	Washington	DC	20004	r
	4/7/2014	Center of the American Experiment	6,600 00		1342 8441 Wayzata Blvd #350	Golden Valley	MN	55426	r
	4/7/2014	Intercollegiate Studies Institute	1,000 00		1344 3901 Centerville Road	Wilmington	DE	19807	r
	8/11/2014	Cato Institute	1,000 00		130 1000 Massachusetts Ave N	Washington	DC	20001	r
	11/6/2014	Becket Fund for Religious Liberty	500 00		137 3000 K Street NW, Suite 2:	Washington	DC	20007	r
		sub-total	12,100 00						
		<b>Total all categories</b>	113,050 00						
		<b>2014 target grant total</b>	112,000 00						
		<b>funding remaining to target</b>	-1,050 00						
		<b>required 2014 distribution amount</b>	110,355 76						