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Form

990-PF

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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Information about Form 990-PF and its instructions is at www.irs.gov/form990pf.

OMB No 1545-0052

2014

Open to Public Inspection

For calendar year 2014, or tax year beginning 01-01-2014, and ending 12-31-2014

Name of foundation STONE FAMILY FOUNDATION		A Employer identification number 43-1773536	
Number and street (or P O box number if mail is not delivered to street address) 320 S BOSTON 19TH FLOOR		B Telephone number (see instructions) (918) 583-1178	
City or town, state or province, country, and ZIP or foreign postal code TULSA, OK 74103		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ 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) \$ 9,091,723		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	
J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)			

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	664			
	2 Check ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	6,000	6,000		
	4 Dividends and interest from securities.	247,261	233,588		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	11,163			
	b Gross sales price for all assets on line 6a 475,813				
	7 Capital gain net income (from Part IV, line 2) . . .		11,192		
	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	265,088	250,780		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0	0		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	2,450	0		2,450
	c Other professional fees (attach schedule)	40,920	40,920		0
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	3,832	0		0
	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	47,202	40,920		2,450
	25 Contributions, gifts, grants paid	475,000			475,000
	26 Total expenses and disbursements. Add lines 24 and 25	522,202	40,920		477,450
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-257,114			
	b Net investment income (if negative, enter -0-)		209,860		
	c Adjusted net income (if negative, enter -0-)				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year			
			(a) Book Value	(b) Book Value	(c) Fair Market Value		
Assets	1	Cash—non-interest-bearing					
	2	Savings and temporary cash investments	70,341	57,837	57,837		
	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	7,320	3,800	3,800		
	10a	Investments—U S and state government obligations (attach schedule)	8,822,951		8,581,272	8,563,380	
	b	Investments—corporate stock (attach schedule)	355,413		356,400	342,219	
	c	Investments—corporate bonds (attach schedule).	32,408		32,408	4	
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____					
	12	Investments—mortgage loans					
	13	Investments—other (attach schedule)	118,827		118,829	124,483	
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____					
15	Other assets (describe ▶ _____)		0		0		0
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	9,407,260	9,150,546	9,091,723			
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	0	0			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0			
	29	Retained earnings, accumulated income, endowment, or other funds	9,407,260	9,150,546			
	30	Total net assets or fund balances (see instructions)	9,407,260	9,150,546			
	31	Total liabilities and net assets/fund balances (see instructions)	9,407,260	9,150,546			

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 9,407,260
2	Enter amount from Part I, line 27a	2 -257,114
3	Other increases not included in line 2 (itemize) ▶ 	3 400
4	Add lines 1, 2, and 3	4 9,150,546
5	Decreases not included in line 2 (itemize) ▶ _____	5 0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6 9,150,546

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 Additional Data Table			
b				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	See Additional Data Table		
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(I) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(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	
a	See Additional Data Table		
b			
c			
d			
e			

2	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	11,192
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8	}	3	

Part V

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

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

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

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

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2013	431,836	9,324,059	0.046314
2012	491,750	9,763,413	0.050367
2011	372,525	9,681,425	0.038478
2010	306,944	3,837,914	0.079977
2009	150,500	3,189,922	0.047180

2	Total of line 1, column (d).	2	0.262316
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	0.052463
4	Enter the net value of noncharitable-use assets for 2014 from Part X, line 5.	4	9,170,052
5	Multiply line 4 by line 3.	5	481,088
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	2,099
7	Add lines 5 and 6.	7	483,187
8	Enter qualifying distributions from Part XII, line 4.	8	477,450

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

Part VI

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

1a		Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1			
b		Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b		1	4,197
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	4,197
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	4,197
6		Credits/Payments			
a		2014 estimated tax payments and 2013 overpayment credited to 2014	6a	3,800	
b		Exempt foreign organizations—tax withheld at source	6b		
c		Tax paid with application for extension of time to file (Form 8868)	6c	2,000	
d		Backup withholding erroneously withheld	6d		
7		Total credits and payments. Add lines 6a through 6d.		7	5,800
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	
10		Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		10	1,603
11		Enter the amount of line 10 to be Credited to 2015 estimated tax 1,603 Refunded		11	0

Part VII-A

Statements Regarding Activities

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	Yes	No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)? <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.</i>	1b		No
c	Did the foundation file Form 1120-POL for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation \$ 0 (2) On foundation managers \$ 0			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ 0			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes.</i>	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV.</i>	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions): KS, OK			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation.</i>	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV.</i>	9		No
10	Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>	10		No

Part VII-A

Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address ▶N/A				
14	The books are in care of ▶SAMUEL C STONE Telephone no ▶(918) 583-1178 Located at ▶320 S BOSTON 19TH FLOOR TULSA OK ZIP +4 ▶74103			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here ▶ ☐ and enter the amount of tax-exempt interest received or accrued during the year ▶	15		
16	At any time during calendar year 2014, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	Yes	No
See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes", enter the name of the foreign country ▶				

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?. ☐ Yes ☒ No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?. ☐ Yes ☒ No (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? 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?. 1c			No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014?. ☐ 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). 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? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2014.</i>). 3b			
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2014?	4b		No

Part VII-B

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

5a During the year did the foundation pay or incur any amount to				
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?		☐ Yes	☒ No	
(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?		☐ Yes	☒ No	
(3) Provide a grant to an individual for travel, study, or other similar purposes?		☐ Yes	☒ No	
(4) Provide a grant to an organization other than a charitable, etc , organization described in section 4945(d)(4)(A)? (see instructions).		☐ Yes	☒ No	
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?		☐ Yes	☒ No	
b If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?		5b		
Organizations relying on a current notice regarding disaster assistance check here.				☐
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?				☐ Yes ☐ No
If "Yes," attach the statement required by Regulations section 53.4945–5(d).				
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		☐ Yes ☒ No		
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		6b		No
If "Yes" to 6b, file Form 8870.				
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?		☐ Yes ☒ No		
b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?		7b		

Part VIII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).				
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SUE STONE HUNTER	VICE-	0	0	0
5925 STATE LINE	PRESIDENT/SECRETARY			
KANSAS CITY,MO 64113	1 00			
SAMUEL C STONE	PRESIDENT	0	0	0
2204 SOUTH ST LOUIS	5 00			
TULSA,OK 74114				
SARA STONE LAUGHREN	TRUSTEE	0	0	0
620 WEST 42ND ST APT 58D	1 00			
NEW YORK,NY 10036				
BRITTON HUNTER	TRUSTEE	0	0	0
5815 STATE LINE	1 00			
KANSAS CITY,MO 64113				
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	
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3.	0

Part X

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	9,270,970
b	Average of monthly cash balances.	1b	38,727
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	9,309,697
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	9,309,697
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	139,645
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	9,170,052
6	Minimum investment return. Enter 5% of line 5.	6	458,503

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	458,503
2a	Tax on investment income for 2014 from Part VI, line 5.	2a	4,197
b	Income tax for 2014 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	4,197
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	454,306
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	454,306
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1. . . .	7	454,306

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	477,450
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	477,450
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	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	477,450
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				454,306
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only.			8,374	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2014				
a From 2009.				
b From 2010.				
c From 2011.				
d From 2012.				
e From 2013.				
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2014 from Part XII, line 4 ▶ \$ 477,450				
a Applied to 2013, but not more than line 2a			8,374	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2014 distributable amount.				454,306
e Remaining amount distributed out of corpus	14,770			
5 Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	14,770			
b Prior years' undistributed income Subtract line 4b from line 2b.		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 2013 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2014 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions). . . .	0			
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a	14,770			
10 Analysis of line 9				
a Excess from 2010. . . .				
b Excess from 2011. . . .				
c Excess from 2012. . . .				
d Excess from 2013. . . .				
e Excess from 2014. . . .	14,770			

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

1a

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

b

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

☐ 4942(j)(3) or ☐ 4942(j)(5)

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

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

1

Information Regarding Foundation Managers:

a

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

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

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

SAMUEL C STONE
320 S BOSTON 19TH FLOOR
TULSA, OK 74103
(918) 583-1178

b

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

SPECIFIC FORM NOT REQUIRED

c

Any submission deadlines

APPLICATIONS AND REQUESTS ARE ACCEPTED AT ANYTIME

d

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

NONE

Form 990-PF (2014)

Part XV

Supplementary Information (continued)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	475,000
b Approved for future payment				
Total			3b	0

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2014)

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			Yes	No
a Transfers from the reporting foundation to a noncharitable exempt organization of				
(1) Cash.		1a(1)		No
(2) Other assets.		1a(2)		No
b Other transactions				
(1) Sales of assets to a noncharitable exempt organization.		1b(1)		No
(2) Purchases of assets from a noncharitable exempt organization.		1b(2)		No
(3) Rental of facilities, equipment, or other assets.		1b(3)		No
(4) Reimbursement arrangements.		1b(4)		No
(5) Loans or loan guarantees.		1b(5)		No
(6) Performance of services or membership or fundraising solicitations.		1b(6)		No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.		1c		No
d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received				

[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule		
(a) Name of organization	(b) Type of organization	(c) Description of relationship

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

Sign Here	*****	2015-07-02	*****	May the IRS discuss this return with the preparer shown below (see instr)? ☒ Yes ☐ No
	Signature of officer or trustee	Date	Title	

Paid Preparer Use Only	Print/Type preparer's name DIANE POESCHEL	Preparer's Signature	Date 2015-07-02	Check if self-employed ☒	PTIN P00136199
	Firm's name ☒ M & L CPA'S CHARTERED			Firm's EIN ☒ 02-0657787	
	Firm's address ☒ 114 W LOCUST PO BOX 230 EL DORADO, KS 67042			Phone no (316) 321-1350	

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
VANGUARD GNMA FUND ADM FUND #536		2012-07-11	2014-12-09
COMMERCE BANCSHARES INC		1954-04-03	2014-12-17
THORNBURG MORTGAGE INC - DELISTED		2007-06-14	2014-09-05
MI STATE STRETEGIC FUND LIMITED OBLIGATION		2009-07-29	2014-06-01
NEWTON CNTY MO IND DEV AUTH		2009-05-08	2014-01-01
SPRINGFIELD MO PUBLIC BLDG CORP		2009-11-16	2014-06-01
OH ST DEPT ADMIN SVCS RICKENBACKER PORT AUTH		2009-09-10	2014-06-15
CAPITAL GAINS DIVIDENDS	P		

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
400,000		409,612	-9,612
38			38
		9	-9
20,000		20,000	0
5,000		5,000	0
25,000		25,000	0
5,000		5,000	0
20,775			20,775

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(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	
			-9,612
			38
			-9
			0
			0
			0
			0
			20,775

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
AGRICULTURAL FUTURE OF AMERICA PO BOX 414838 KANSAS CITY,MO 64141	N/A	PC	OPERATIONS	20,000
ARTS & HUMANITIES COUNCIL OF TULSA 101 E ARCHER ST TULSA,OK 74103	N/A	PC	OPERATIONS	5,000
BIG HOLE WATERSHED COMMITTEE PO BOX 21 DIVIDE,MT 59727	N/A	PC	OPERATIONS	15,000
BOTANICA THE WICHITA GARDENS 701 N AMIDON WICHITA,KS 67203	N/A	PC	OPERATIONS	8,000
BUTLER COUNTY HISTORICAL SOCIETY 383 E CENTRAL EL DORADO,KS 67042	N/A	POF	OPERATIONS	36,500
CATSKILL MOUNTAINS JUNIOR GOLF INC 33 PROSPECT ST STAMFORD,NY 12167	N/A	PC	OPERATIONS	6,000
CENTRAL KANSAS COMMUNITY FOUNDATION 301 N MAIN STE 200 NEWTON,KS 67114	N/A	PC	OPERATIONS	2,500
CHILDREN'S CENTER FOR THE VISUALLY IMPAIRED 3101 MAIN ST KANSAS CITY,MO 64111	N/A	PC	OPERATIONS	5,300
CHILDREN'S MERCY HOSPITAL 2401 GILLHAM RD KANSAS CITY,MO 64108	N/A	PC	OPERATIONS	5,000
COUTTS MEMORIAL MUSEUM OF ART INC 110 N MAIN ST EL DORADO,KS 67042	N/A	POF	OPERATIONS	30,000
EARLY CHILDHOOD DEVELOPMENT CENTER 1900 SECOND AVE 9TH FLOOR NEWYORK,NY 10029	N/A	PC	OPERATIONS	7,250
ELMWOOD CEMETERY SOCIETY PO BOX 27255 KANSAS CITY,MO 64127	N/A	NC	OPERATIONS	8,000
FRIENDS OF SLS INC 45 EAST 9TH ST APT 7 NEWYORK,NY 10003	N/A	PC	OPERATIONS	12,000
GRACE AND HOLY TRINITY CATHEDRAL PO BOX 412048 KANSAS CITY,MO 64141	N/A	PC	OPERATIONS	2,500
JUNIOR LEAGUE OF CITY OF NEW YORK 130 E 80TH ST NEWYORK,NY 10075	N/A	PC	OPERATIONS	3,500
Total 3a				475,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
KANSAS GOVERNOR'S ANNUAL ONE SHOT TURKEY HUNT 200 S MAIN STE 2 EL DORADO,KS 67042	N/A	PC	OPERATIONS	5,000
KANSAS STATE HISTORICAL SOCIETY 6425 SW 6TH AVE TOPEKA,KS 666151099	N/A	PC	OPERATIONS	5,000
KCPT PUBLIC TELEVISION 19 125 E THIRTY-FIRST ST KANSAS CITY,MO 64108	N/A	PC	OPERATIONS	6,000
LEADERSHIP BUTLER INC 2375 W CENTRAL AVE EL DORADO,KS 67042	N/A	PC	OPERATIONS	5,000
LIBERTY MEMORIAL FOUNDATION 100 WEST 26TH ST KANSAS CITY,MO 64108	N/A	PC	OPERATIONS	15,000
MUSIC THEATRE OF WICHITA 225 W DOUGLAS STE 202 WICHITA,KS 67202	N/A	PC	OPERATIONS	5,000
OKLAHOMA SCHOOL OF SCIENCE & MATH FOUNDATION 1141 N LINCOLN BLVD OKLAHOMA CITY,OK 73104	N/A	PC	OPERATIONS	5,000
PEMBROOK HILL SCHOOL PO BOX 412244 KANSAS CITY,MO 641791050	N/A	PC	OPERATIONS	14,000
PHILBROOK ART MUSEUM PO BOX 52510 TULSA,OK 74152	N/A	PC	OPERATIONS	10,000
RANCLAND TRUST OF KANSAS 6031 SW 37TH ST TOPEKA,KS 66614	N/A	PC	OPERATIONS	10,000
ROSE BROOKS CENTER PO BOX 320599 KANSAS CITY,MO 64132	N/A	PC	OPERATIONS	6,125
RUSSELL CHILD DEVELOPMENT CENTER 714 BALLINGER GARDEN CITY,KS 67846	N/A	PC	OPERATIONS	6,000
SAFEHOME INC PO BOX 4563 OVERLAND PARK,KS 66204	N/A	PC	OPERATIONS	6,125
SOONER ROWING ASSOCIATION 715 W 21ST ST TULSA,OK 74107	N/A	PC	OPERATIONS	20,000
ST ANDREW'S EPISCOPAL CHURCH 6401 WARNALL TERR KANSAS CITY,MO 64113	N/A	PC	OPERATIONS	2,000
Total  3a				475,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
THE EPISCOPAL DIOCESE OF KANSAS 835 SW POLK ST TOPEKA,KS 666121688	N/A	PC	OPERATIONS	2,500
THE NATURE CONSERVANCY - KANSAS CHAPTER 700 SW JACKSON ST TOPEKA,KS 66603	N/A	PC	OPERATIONS	40,000
THE NATURE CONSERVANCY - OKLAHOMA CHAPTER 2727 E 21ST STE 102 TULSA,OK 74114	N/A	PC	OPERATIONS	20,000
THE UNIVERSITY OF KANSAS ENDOWMENT PO BOX 7380 LAWRENCE,KS 66044	N/A	PC	OPERATIONS	5,200
THE UNIVERSITY OF KANSAS HOSPITAL 2330 SHAWNEE MISSION PARKWAY STE 302 MS 5001 WESTWOOD,KS 66205	N/A	PC	OPERATIONS	7,000
THE UNIVERSITY OF PITTSBURGH - MEDICAL AND HEALTH SCIENCES FOUNDATION FORBES TOWER STE 8084 3600 FORBES AVE MEYRAN AVE PITTSBURGH,PA 15213	N/A	PC	OPERATIONS	10,000
THE WICHITA CENTER FOR THE ARTS 9112 E CENTRAL WICHITA,KS 67206	N/A	PC	OPERATIONS	12,000
TRINITY EPISCOPAL CHURCH PO BOX 507 EL DORADO,KS 67042	N/A	PC	OPERATIONS	32,500
TULSA BOTANIC GARDEN PO BOX 707 TULSA,OK 74101	N/A	PC	OPERATIONS	5,000
UNIVERSITY OF TULSA WOMENS ROWING 800 STUCKER DR TULSA,OK 74104	N/A	PC	OPERATIONS	25,000
WICHITA ART MUSEUM 1400 W MUSEUM BLVD WICHITA,KS 67203	N/A	PC	OPERATIONS	10,000
WICHITA STATE UNIVERSITY FOUNDATION 1845 FAIRMONT CAMPUS BOX 2 WICHITA,KS 67208	N/A	PC	OPERATIONS	4,000
WICHITA SYMPHONY 225 W DOUGLAS STE 207 WICHITA,KS 67202	N/A	PC	OPERATIONS	10,000
WORLD WAR II HISTORY CENTER FOUNDATION 119 W CENTRAL AVE EL DORADO,KS 67042	N/A	PC	OPERATIONS	5,000
Total  3a				475,000

TY 2014 Accounting Fees Schedule**Name:** STONE FAMILY FOUNDATION**EIN:** 43-1773536

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
M & L CPA'S, CHARTERED	2,450	0		2,450

**TY 2014 Investments Corporate
Bonds Schedule**

Name: STONE FAMILY FOUNDATION
EIN: 43-1773536

Name of Bond	End of Year Book Value	End of Year Fair Market Value
EASTMAN KODAK COMPANY SENIOR NOTE	32,408	4

TY 2014 Investments Corporate Stock Schedule

Name: STONE FAMILY FOUNDATION

EIN: 43-1773536

Name of Stock	End of Year Book Value	End of Year Fair Market Value
COMMERCE BANCSHARES INC	86,668	122,250
FORESTAR REAL ESTATE GROUP	129,153	56,456
GENERAL ELECTRIC CO	21,444	30,324
CIT GROUP INC	8,195	8,801
THORNBURG MORTGAGE INC	0	0
FORD MOTOR COMPANY	33,840	31,000
ARTISAN MID CAP VALUE FUND - INV	16,460	21,774
COMMERCE MIDCAP GROWTH FUND INST	6,800	7,867
JANUS FORTY FUND I	20,939	19,958
LEGG MASON CLEARBRIDGE SMALL CAP GROWTH FUND CLASS I	7,166	14,235
MORGAN STANLEY INST FUND TRUST MID CAP GROWTH PORTFOLIO	4,900	6,723
TARGET SMALL CAPITALIZATION VALUE PORTFOLIO	4,337	5,967
ISHARES MSCI ALL COUNTRY ASIA EX-JAPAN INDEX FUND	3,292	3,656
JPMORGAN INTERNATIONAL VALUE FUND INS	4,839	5,438
LAZARD EMERGING MARKETS PORTFOLIO-IN	6,387	5,967
AMERICAN HOME MORTGAGE INVEST PREFERRED STOCK	1	1
EASTMAN KODAK COMPANY	1,979	1,802

TY 2014 Investments Government Obligations Schedule

Name: STONE FAMILY FOUNDATION

EIN: 43-1773536

**US Government Securities - End of
Year Book Value:**

8,259,642

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

8,232,052

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

321,630

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

331,328

TY 2014 Investments - Other Schedule

Name: STONE FAMILY FOUNDATION

EIN: 43-1773536

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
HARRIS NA CD	AT COST	62,120	55,461
JP MORGAN CHASE BANK CD	AT COST	56,705	68,635
EASTMAN KODAK COMPANY WARRANT	AT COST	2	213
EASTMAN KODAK COMPANY WARRANT	AT COST	2	174

TY 2014 Other Assets Schedule

Name: STONE FAMILY FOUNDATION

EIN: 43-1773536

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
ORGANIZATION COSTS	0	0	0

TY 2014 Other Increases Schedule

Name: STONE FAMILY FOUNDATION

EIN: 43-1773536

Description	Amount
PRIOD PERIOD CONTRIBUTION	400

TY 2014 Other Professional Fees Schedule**Name:** STONE FAMILY FOUNDATION**EIN:** 43-1773536

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
THE COMMERCE TRUST COMPANY	40,920	40,920		0

TY 2014 Taxes Schedule**Name:** STONE FAMILY FOUNDATION**EIN:** 43-1773536

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES	48	0		0
2013 EXCISE TAX	3,784	0		0