



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



Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

▶ Do not enter social security numbers on this form as it may be made public.

▶ Information about Form 990-PF and its 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 JACK AND SUSAN PIERSON CHARITABLE TRUST		A Employer identification number 54-6828522	
Number and street (or P O box number if mail is not delivered to street address) 2801 WEST 63RD STREET		B Telephone number (see instructions) (913) 541-0066	
City or town, state or province, country, and ZIP or foreign postal code SHAWNEE MISSION, KS 66208		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16)▶\$ 1,021,020		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 <i>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))</i>		(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)				
	2 Check ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	17	17		
	4 Dividends and interest from securities.	25,181	24,528		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	1,190			
	b Gross sales price for all assets on line 6a 1,190				
	7 Capital gain net income (from Part IV, line 2) . . .		1,190		
	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	26,388	25,735		
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)	1,800	0		1,800
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)	24	24		0
	17 Interest				
	18 Taxes (attach schedule) (see instructions) . . .	557	311		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	2,381	335		1,800
	25 Contributions, gifts, grants paid	45,945			45,945
	26 Total expenses and disbursements. Add lines 24 and 25	48,326	335		47,745
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-21,938			
	b Net investment income (if negative, enter -0-)		25,400		
	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	51,692	2,467	2,467
	3	Accounts receivable ▶ <u>2,552</u>			
		Less allowance for doubtful accounts ▶ _____	300	2,552	2,552
	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)			
	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)	874,482	900,004	1,016,001	
14	Land, buildings, and equipment basis ▶ _____				
	Less accumulated depreciation (attach schedule) ▶ _____				
15	Other assets (describe ▶ _____)				
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	926,474	905,023	1,021,020	
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable	824	1,850	
	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)	824	1,850	
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	925,650	903,173	
	30	Total net assets or fund balances (see instructions)	925,650	903,173	
	31	Total liabilities and net assets/fund balances (see instructions) . . .	926,474	905,023	

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)	1 925,650
2	Enter amount from Part I, line 27a	2 -21,938
3	Other increases not included in line 2 (itemize) ▶ _____	3 0
4	Add lines 1, 2, and 3	4 903,712
5	Decreases not included in line 2 (itemize) ▶ _____	5 539
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6 903,173

Part IV

Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1 a	CAPITAL GAINS DIVIDENDS	P		
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 1,190			1,190
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			1,190
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	1,190
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	44,507	963,049	0 046215
2012	54,590	974,181	0 056037
2011	500	985,000	0 000508
2010			
2009			

2	Total of line 1, column (d).	2	0 102760
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 034253
4	Enter the net value of noncharitable-use assets for 2014 from Part X, line 5.	4	997,640
5	Multiply line 4 by line 3.	5	34,172
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	254
7	Add lines 5 and 6.	7	34,426
8	Enter qualifying distributions from Part XII, line 4.	8	47,745

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		
Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		1 254
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.		3 254
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-		5 254
6 Credits/Payments		
a 2014 estimated tax payments and 2013 overpayment credited to 2014	6a	
b Exempt foreign organizations—tax withheld at source	6b	
c Tax paid with application for extension of time to file (Form 8868)	6c	
d Backup withholding erroneously withheld	6d	
7 Total credits and payments. Add lines 6a through 6d.		7 0
8 Enter any penalty for underpayment of estimated tax. Check here ☐ 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 ☐		9 254
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid ☐		10
11 Enter the amount of line 10 to be Credited to 2015 estimated tax ☐ Refunded ☐		11

Part VII-A Statements Regarding Activities			
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 ☐ \$ <u>0</u> (2) On foundation managers ☐ \$ <u>0</u>			
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☐ \$ <u>0</u>			
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 _____			
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 JOHN T PIERSON JR Telephone no (913) 541-0066 Located at 2801 WEST 63RD STREET SHAWNEE MISSION KS ZIP +4 66208			
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? 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	16	Yes	No

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)? Organizations relying on a current notice regarding disaster assistance check here.	1b		
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2014?.	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014?. If "Yes," list the years 20 , 20 , 20 , 20			
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? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2014.).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2014?	4b		No

Part VII-B

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

5a	During the year did the foundation pay or incur any amount to			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	☐ 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
JOHN T PIERSON JR	CO TRUSTEE	0	0	0
2801 WEST 63RD STREET	0 00			
SHAWNEE MISSION, KS 66208				
SUSAN PIERSON	CO TRUSTEE	0	0	0
2801 WEST 63RD STREET	0 00			
SHAWNEE MISSION, KS 66208				
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	977,478
b	Average of monthly cash balances.	1b	35,354
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	1,012,832
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	1,012,832
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	15,192
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	997,640
6	Minimum investment return. Enter 5% of line 5.	6	49,882

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	49,882
2a	Tax on investment income for 2014 from Part VI, line 5.	2a	254
b	Income tax for 2014 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	254
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	49,628
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	49,628
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	49,628

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	47,745
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	47,745
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	254
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	47,491

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				49,628
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only.			0	
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. 2,843				
e From 2013.				
f Total of lines 3a through e.	2,843			
4 Qualifying distributions for 2014 from Part XII, line 4 ▶ \$ 47,745				
a Applied to 2013, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2014 distributable amount.				47,745
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a).)	1,883			1,883
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	960			
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	960			
10 Analysis of line 9				
a Excess from 2010. . . .				
b Excess from 2011. . . .				
c Excess from 2012. . . . 960				
d Excess from 2013. . . .				
e Excess from 2014. . . .				

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 email address of the person to whom applications should be addressed

b

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

c

Any submission deadlines

d

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

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	45,945
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)

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				
202020 PO BOX 96669 WASHINGTON,DC 200908088	N/A	PUBLIC CHARITY	CHARITABLE	600
50-50 IN 2020 - IOWA WOMEN'S FOUNDATION 2201 E GRANTVIEW DR CORALVILLE,IA 52241	N/A	PUBLIC CHARITY	CHARITABLE	500
AMERICAN CENTER FOR LAW AND JUSTICE PO BOX 90555 WASHINGTON,DC 200908088	N/A	PUBLIC CHARITY	CHARITABLE	200
AMERICAN CIVIL RIGHTS UNION 3213 DUKE ST ALEXANDRIA,VA 22314	N/A	PUBLIC CHARITY	CHARITABLECHARITABLE,LISTTOTAL 100	700
AMERICAN CONSERVATIVE UNION 1331 H ST NW WASHINGTON,DC 20005	N/A	PUBLIC CHARITY	CHARITABLECHARITABLE,LISTTOTAL 400	600
AMERICAN FEDERATION OF POLICE AND CONCERNED CITIZENS 6350 HORIZON DR TITUSVILLE,FL 32780	N/A	PUBLIC CHARITY	CHARITABLE	20
AMERICAN RED CROSS GREATER KANSAS CITY CHAPTER 211 WARMOUR BLVD KANSAS CITY,MO 64111	N/A	PUBLIC CHARITY	CHARITABLE	200
ARIZONA SONORA DESERT MUSEUM 2021 N KINNEY RD TUCSON,AZ 85743	N/A	PUBLIC CHARITY	CULTURAL	700
ARTS KC REGIONAL ARTS COUNCIL 106 SOUTHWEST BLVD KANSAS CITY,MO 64106	N/A	PUBLIC CHARITY	CULTURAL	200
BOYS AND GIRLS CLUBS OF GREATER KANSAS CITY 2405 ELMWOOD AVE KANSAS CITY,MO 64127	N/A	PUBLIC CHARITY	CHARITABLE	200
BOYS TOWN 14100 CRAWFORD ST BOYS TOWN,NE 68010	N/A	PUBLIC CHARITY	CHARITABLE	400
CAPITAL RESEARCH CENTER 1513 16TH ST NW WASHINGTON,DC 20036	N/A	PUBLIC CHARITY	CHARITABLE	100
CHRISTIAN APPALACHIAN PROJECT 2610 PALUMBO DR LEXINGTON,KY 40509	N/A	PUBLIC CHARITY	CHARITABLECHARITABLE,LISTTOTAL 100	200
CHRISTIAN FORWARD SOUTHEAST ASIA 1420 SPRING HILL RD STE 490 MCLEAN,VA 22102	N/A	PUBLIC CHARITY	CHARITABLE	100
CITIZENS UNITED FOUNDATION 1006 PENNSYLVANIA AVE WASHINGTON,DC 20003	N/A	PUBLIC CHARITY	CHARITABLE	100
Total  3a				45,945

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				
CITY UNION MISSION 1100 E 11TH ST KANSAS CITY,MO 64106	N/A	PUBLIC CHARITY	CHARITABLE	800
COALITITION TO SALUTE AMERICA'S HEROES 552 FORT EVENS RD SUITE 300 LEESBURG,VA 20176	N/A	PUBLIC CHARITY	CHARITABLE	100
COMMEMORATIVE AIR FORCE RED TAIL SQUADRON 6 AERO PLAZA NEW CENTURY,KS 66031	N/A	PUBLIC CHARITY	CHARITABLE	300
COUNCIL OF INDIAN NATIONS PO BOX 1800 APACHE JUNCTION,AZ 85117	N/A	PUBLIC CHARITY	CHARITABLE	400
DE LASALLE EDUCATION CENTER 3740 FOREST AVE KANSAS CITY,MO 64109	N/A	PUBLIC CHARITY	CHARITABLE	200
EISENHOWER FOUNDATION 200 SE FOURTH ST ABILENE,KS 67410	N/A	PUBLIC CHARITY	CHARITABLE	400
FIRST CALL KC 9091 STATE LINE RD KANSAS CITY,MO 64114	N/A	PUBLIC CHARITY	CHARITABLE	400
FREEDOM WORKS 400 N CAPITOL ST WASHINGTON,DC 20001	N/A	PUBLIC CHARITY	EDUCATIONAL	100
FRIENDS OF THE SMITHSONIAN MUSEUM PO BOX 37012 WASHINGTON,DC 20013	N/A	PUBLIC CHARITY	EDUCATIONAL	250
GREAT PLAINS SPCA 5424 ANTIOCH DR MERRIAM,KS 66202	N/A	PUBLIC CHARITY	PREVENTION OF CRUELTY TO ANIMALS	300
HARVARD UNIVERSITY BUSINESS SCHOOL 117 WESTERN AVE ALLSTON,MA 02134	N/A	PUBLIC CHARITY	EDUCATIONAL	1,000
HARVESTERS 3801 TOPPING AVE KANSAS CITY,MO 64129	N/A	PUBLIC CHARITY	CHARITABLE	400
HEART OF AMERICA BOY SCOUT COUNCIL 10210 HOLMES RD KANSAS CITY,MO 64131	N/A	PUBLIC CHARITY	CHARITABLE	1,000
HELP HOSPITALIZED VETERANS PO BOX 98088 WASHINGTON,DC 200908088	N/A	PUBLIC CHARITY	CHARITABLE	100
HERITAGE FOUNDATION 214 MASSACHUSETTS AVE WASHINGTON,DC 20002	N/A	PUBLIC CHARITY	CHARITABLE	1,500
Total  3a				45,945

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>				
INTERNATIONAL RELATIONS COUNCIL OF KANSAS CITY 911 MAIN STE 2226 KANSAS CITY,MO 64105	N/A	PUBLIC CHARITY	CHARITABLE	300
JUDICIAL WATCH 425 THIRD ST WASHINGTON,DC 20024	N/A	PUBLIC CHARITY	CHARITABLE	900
JUNIOR ACHIEVEMENT OF MIDDLE AMERICA 4049 PENNSYLVANIA AVE KANSAS CITY,MO 64111	N/A	PUBLIC CHARITY	CHARITABLE	200
JUSTICE FOR BRIAN TERRY FUND 2575 E CAMBELBACK RD PHOENIX,AZ 85016	N/A	PUBLIC CHARITY	CHARITABLE	100
KANSAS CITY COMMUNITY GARDENS 6917 KENSINGTON AVE KANSAS CITY,MO 64132	N/A	PUBLIC CHARITY	CHARITABLE	250
KANSAS CITY RESCUE MISSION 1520 CHERRY ST KANSAS CITY,MO 64108	N/A	PUBLIC CHARITY	CHARITABLE	600
KANSAS TROOPERS FOUNDATION 1200 SW 10TH AVE TOPEKA,KS 66604	N/A	PUBLIC CHARITY	CHARITABLE	100
KEMPER MUSEUM 74420 WARWICK BLVD KANSAS CITY,MO 64111	N/A	PUBLIC CHARITY	CHARITABLE,LISTTOTAL 485	1,500
LIBERTY INSTITUTE 2001 W PLANO PKWY PLANO,TX 75075	N/A	PUBLIC CHARITY	EDUCATIONAL	100
LINDA HALL LIBRARY - UMKC 5109 CHERRY ST KANSAS CITY,MO 64110	N/A	PUBLIC CHARITY	CHARITABLE	1,000
MACULAR DEGENERATION RESEARCH FOUNDATION PO BOX 531313 HENDERSON,NE 89053	N/A	PUBLIC CHARITY	CHARITABLECHARITABLE,LISTTOTAL 100	200
NATIONAL RIGHT TO WORK LEGAL DEFENSE FOUNDATION 8001 BRADDOCK RD SPRINGFIELD,VA 22160	N/A	PUBLIC CHARITY	CHARITABLE,LISTTOTAL 900	100
NATIONAL WILDLIFE FEDERATION 11100 WILDLIFE CENTER DRIVE RESTON,VA 20190	N/A	PUBLIC CHARITY	CHARITABLE	100
NATIONAL WORLD WAR ONE MUSEUM 100 W 26 ST KANSAS CITY,MO 64108	N/A	PUBLIC CHARITY	CHARITABLE	400
NELSON ATKINS MUSEUM OF ART 4525 OAK ST KANSAS CITY,MO 64111	N/A	PUBLIC CHARITY	CHARITABLE	3,000
Total  3a				45,945

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>				
PACIFIC LEGAL FOUNDATION 930 G STREET SACRAMENTO,CA 05814	N/A	PUBLIC CHARITY	CHARITABLE	200
PARALYZED VETERANS OF AMERICA 801 EIGHTEENTH ST NW WASHINGTON,DC 20006	N/A	PUBLIC CHARITY	CHARITABLE	200
PAWS FOR PURPLE HEARTS 5860 LABATH AVE STE A ROHNERT,CA 94928	N/A	PUBLIC CHARITY	CHARITABLE	500
PEMBROKE HILL SCHOOL 5121 STATE LINE RD KANSAS CITY,MO 64112	N/A	PUBLIC CHARITY	EDUCATIONAL	1,500
POWELL GARDENS 1609 NW HIGHWAY KINGSVILLE,MO 64061	N/A	PUBLIC CHARITY	CHARITABLECHARITABLE,LISTTOTAL 2750	2,000
PRINCETON ALUMNI CORPS - PROJECT 55 12 STOCKTON ST PRINCETON,NJ 08540	N/A	PUBLIC CHARITY	CHARITABLE	100
PRINCETON UNIVERSITY 701 CARNEGIE CENTER PRINCETON,NJ 08540	N/A	PUBLIC CHARITY	CHARITABLE	1,000
SALVATION ARMY 1351 E 10 ST KANSAS CITY,MO 64106	N/A	PUBLIC CHARITY	CHARITABLE	1,800
SOLDIER'S WISH - AMERICAN LEGION 700 N PENNSYLVANIA ST INDIANAPOLIS,IN 46206	N/A	PUBLIC CHARITY	CHARITABLE	25
SOUTHEASTERN LEGAL FOUNDATION 2255 SEWELL MILL RD MARIETTA,GA 30062	N/A	PUBLIC CHARITY	CHARITABLE	1,900
ST JOSEPH INDIAN SCHOOL 1301 N MAIN ST CHAMBERLAIN,SD 57325	N/A	PUBLIC CHARITY	CHARITABLE	100
SUSAN G KOMEN FOUNDATION 1111 MAIN ST 450 KANSAS CITY,MO 64105	N/A	PUBLIC CHARITY	MEDICAL RESEARCH	100
THE BARSTOW SCHOOL 11511 STATE LINE ROAC KANSAS CITY,MO 64114	N/A	PUBLIC CHARITY	EDUCATIONAL	200
THE CATO INSTITUTE 1000 MASSACHUSETTS AVE NW WASHINGTON,DC 20001	N/A	PUBLIC CHARITY	EDUCATIONAL	500
THE CONSERVATIVE CAUCUS 450 MAPLE AVE E VIENNA,VA 22180	N/A	PUBLIC CHARITY	CHARITABLE	100
Total			 3a	45,945

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 FIRST TEE OF KANSAS CITY 7501 BLUE RIVER RD KANSAS CITY,MO 64132	N/A	PUBLIC CHARITY	CHARITABLE	200
THE NATURE CONSERVANCY 4245 FAIRFAX DR STE 100 ARLINGTON,VA 22203	N/A	PUBLIC CHARITY	CHARITABLE	100
THE USO P O BOX 9686025 WASHINGTON,DC 20077	N/A	PUBLIC CHARITY	CHARITABLE	300
TUCSON BOTANICAL GARDENS 2150 N ALVERNON WAY TUCSON,AZ 85716	N/A	PUBLIC CHARITY	CHARITABLE	2,200
US JUSTICE FOUNDATION 932 D ST 2 RAMONA,CA 92065	N/A	PUBLIC CHARITY	CHARITABLE	300
VIETNAM VETERANS MEMORIAL FUND 2600 VIRGINIA AVE N/W 104 WASHINGTON,DC 20037	N/A	PUBLIC CHARITY	CHARITABLE	100
VILLAGE PRESBYTERIAN CHURCH 6641 MISSION RD PRAIRIE VILLAGE,KS 66208	N/A	PUBLIC CHARITY	RELIGIOUS	10,000
WAYSIDE WAIFS 3901 E MARTHA TRUMAN RD KANSAS CITY,MO 64137	N/A	PUBLIC CHARITY	PREVENTION OF CRUELTY TO ANIMALS	900
WOUNDED WARRIERS PROJECT 4899 BELFORT RD STE 300 JACKSONVILLE,FL 32256	N/A	PUBLIC CHARITY	CHARITABLE	700
Total  3a				45,945

TY 2014 Investments - Other Schedule

Name: JACK AND SUSAN PIERSON CHARITABLE TRUST

EIN: 54-6828522

Category / Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
VANGUARD FUNDS	AT COST	900,004	1,016,001

TY 2014 Legal Fees Schedule

Name: JACK AND SUSAN PIERSON CHARITABLE TRUST

EIN: 54-6828522

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL AND ACCOUNTING FEES	1,800	0		1,800

TY 2014 Other Decreases Schedule

Name: JACK AND SUSAN PIERSON CHARITABLE TRUST

EIN: 54-6828522

Description	Amount
2013 ROP	539

TY 2014 Other Professional Fees Schedule

Name: JACK AND SUSAN PIERSON CHARITABLE TRUST

EIN: 54-6828522

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
BANK FEE - CHECKS ORDERED	24	24		0

TY 2014 Taxes Schedule**Name:** JACK AND SUSAN PIERSON CHARITABLE TRUST**EIN:** 54-6828522

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
2013 EXCISE TAX PAID IN 2014	246	0		0
FOREIGN TAX PAID	311	311		0