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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.

OMB No 1545-0052

Department of the Treasury

SCANNED AUG 0 6 2015

MILL OF MIR

Open to Public Inspection ▶ Information about Form 990-PF and its separate instructions is at www.irs gov/form990pf Internal Revenue Service For calendar year 2014 or tax year beginning , 2014, and ending Name of foundation A Employer identification number BRUCE , RONALD & PHYLLIS M. TRUST 77-6204532 Number and street (or PO box number if mail is not delivered to street address) Room/suite B Telephone number (see instructions) 805-564-6211 PO BOX 45174 City or town, state or province, country, and ZIP or foreign postal code If exemption application is pending, check here SAN FRANCISCO, CA 94145-0174 G Check all that apply. Initial return Initial return of a former public charity D 1 Foreign organizations, check here • Final return Amended return 2 Foreign organizations meeting the 85% test, check here and attach Address change Name change computation H Check type of organization: X Section 501(c)(3) exempt private foundation If private foundation status was terminated Other taxable private foundation Section 4947(a)(1) nonexempt charitable trust under section 507(b)(1)(A), check here . J Accounting method: X Cash | Accrual I Fair market value of all assets at If the foundation is in a 60-month termination Other (specify) end of year (from Part II, col. (c), line under section 507(b)(1)(B), check here . > 16) ▶ \$ 369,564. (Part I, column (d) must be on cash basis) (d) Disbursements Part | Analysis of Revenue and Expenses (The (a) Revenue and (c) Adjusted net (b) Net investment for charitable total of amounts in columns (b), (c), and (d) expenses per purposes may not necessarily equal the amounts in income income books column (a) (see instructions)) (cash basis only) Contributions gifts, grants, etc., received (attach schedule) . 1 if the foundation is not required to attach Sch B 3 Interest on savings and temporary cash investments-7,496 7,474 STMT 4 Dividends and interest from securities 5a Net rental income or (loss) ___ 42,091 Net gain or (loss) from sale of assets not on line 10 6a Gross sales price for all 75,647 assets on line 6a 42,091 Capital gain net income (from Part IV, line 2) . 8 Net short-term capital gain. Income modifications . 10a Gross sales less returns and allowances . . . Less Cost of goods sold . Gross profit or (loss) (attach schedule) Other income (attach schedule) 11 12 Total. Add lines 1 through 11 49,587 49,565 4,901 5,990 13 Compensation of officers, directors, trustees, etc . . -NONE NONE 14 Other employee salaries and wages NONE NONE 15 Pension plans, employee benefits 》 Legal fees (attach schedule) 16a Accounting fees (attach schedule) STMT 2 NON NONE 1,500 b istrative Other professional fees (attach schedule) . . . C 17 18 Taxes (attach schedule) (see instructions). 3. 19 Depreciation (attach schedule) and depletion. 20 pup 21 NONE Travel, conferences, and meetings NONE NONE NONE Printing and publications <u>□</u> 23 Other expenses (attach schedule) STMT. 4. 10 24 Total operating and administrative expenses. 13,454 4,921 NONE 7,500 8,750 8,750 O 25 Contributions, gifts, grants paid 22,204 4,921 NONE 26 Total expenses and disbursements Add lines 24 and 25 16,250 27 Subtract line 26 from line 12: 27,383 a Excess of revenue over expenses and disbursements . . b Net investment income (if negative, enter -0-) 44,644 c Adjusted net income (if negative, enter -0-). .

_		1 (2014)	Attached schedules and amounts in the	Beginning of year	End o	of year
P	art II	Balance Sheets	description column should be for end-of-year amounts only (See instructions)	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1.	Cash - non-interest-bear	ng			
	,		cash investments	1,883.	3,423	3,423
	ſ		btful accounts ▶			ļ
	4	Pledges receivable -				
]	Less: allowance for dou	btful accounts ▶			
	5	Grants receivable				<u> </u>
	6	Receivables due from	officers, directors, trustees, and other	}		}
	1	disqualified persons (att	ach schedule) (see instructions)			
	7	Other notes and loans r	eceivable (attach schedule) 🕨	j		}
	ł	Less: allowance for dou	btful accounts ►NONE			
ठ	I _		se			<u> </u>
Assets	9		eferred charges			<u> </u>
ä	10 a		e government obligations (attach schedule).			ļ
	b	Investments - corporate	stock (attach schedule) . STMT .5.	239,752.	284,817	. 366,141
	c	Investments - corporate	bonds (attach schedule)			
	11	Investments - land, building	gs, bation b			
	12	Investments - mortgage	loans			
	12	Investments - other latte	sch cchadula)			
	14	Land, buildings, and				
		Less' accumulated deprecia	ation			
	15	Other assets (describe	>)			
	16	Total assets (to be	completed by all filers - see the			
			age 1, item I)	241,635.	288,240	. 369,564
_	17		accrued expenses			ļ
Ģ	1				· · · · · · · · · · · · · · · · · · ·	
ij	20		ors, trustees, and other disqualified persons			1
Liabilities	21		otes payable (attach schedule)			1
ڐ	22		e ▶)			-
	}		·		, -, -, -, -, -, -, -, -, -, -, -, -,	7
	23	Total liabilities (add line	es 17 through 22)		NON	3
		Foundations that fol	low SFAS 117, check here . ▶ 24 through 26 and lines 30 and 31.		· -, -, -, -, -, -, -, -, -, -, -, -, -,	1
ses	24	•	· · · · · · · · · · · · · · · · · · ·			
ano	24		ſ		· · · · · · · · · · · · · · · · · · ·	1
Bal	25 26		· · · · · · · · · · · · · · · · · · ·			1
Б	20		not follow SFAS 117, ▶ 🗓			1
Net Assets or Fund Balances		check here and com	plete lines 27 through 31.	241 625	200 240	
ts	27		cipal, or current funds	241,635.	288,240	4
SSe	28		r land, bldg , and equipment fund			4
t A	29	- ·	lated income, endowment, or other funds	2/1 (25	200 240	-
Š	30		d balances (see instructions)	241,635.	288,240	4
	31		net assets/fund balances (see	241 (25	200 240	
	ort III		nges in Net Assets or Fund Bala	241,635.	288,240	·L
					auet agree with	
1			balances at beginning of year - Part			241 625
2			d on prior year's return)			241,635.
2	. EIILE ! A+h-	ar incresses not inclu-	line 27a	ביים מסתפת מות הדעדעה הדעות הדעדעה	2	27,383. 20,143.
					,	289,161.
٠	, Auu Deci	reases not included in	n line 2 (itemize) ► SEE STAT	TEMENT 6	5	921.
			alances at end of year (line 4 minus li			288,240.
			manage of the or your time a million	J , . a.c.ii, oolaiiiii (D)	<u>,,, 0 0 0 1 1 1 1 1 0 1 </u>	2007210.

288, 240. Form **990-PF** (2014)

_	m 990-PF (2014)					rage 3
Pa		and Losses for Tax on Inve		(A)		
	•	l describe the kind(s) of property sold (=	(b) How acquired P - Purchase	(c) Date acquired	(d) Date sold
	2-story br	ick warehouse; or common stock, 200	shs. MLC Co)	P - Purchase D - Donation	(mo , day, yr.)	(mo , day, yr)
1a	PUBLICLY TRADED	SECURITIES				
b						
C						
ď						
_e			(g) Cost or other basis		(1) (- \
	(e) Gross sales price	(f) Depreciation allowed (or allowable)	plus expense of sale		(h) Gain or (lo (e) plus (f) minu	
			ļ	 	(0) pids (1) 111111	
<u>a</u>			33,556.	 		10,110.
_b	31,981.	 				31,981.
_ <u>c</u>			<u></u>			
d						
_е						
	Complete only for assets s	howing gain in column (h) and owned	by the foundation on 12/31/69	(1)	Gains (Col. (h) ga	un minus
		(j) Adjusted basis	(k) Excess of col (i)		(k), but not less t	
	(i) F M V. as of 12/31/69	as of 12/31/69	over col (j), if any	ĺ	Losses (from co	l, (h))
_	-					10,110.
_ <u>a</u>						31,981.
<u>b</u>						31,301.
<u>C</u>						
<u>d</u>						
_e			<u> </u>			
2	Capital gain net income of	or (not conital local	gain, also enter in Part I, line 7			
_	Capital gain liet income c	If	(loss), enter -0- in Part I, line 7	2		42,091.
3	Net short-term capital gai	in or (loss) as defined in sections 1	222(5) and (6):	1		
	If gain, also enter in Pa	irt I, line 8, column (c) (see ins	tructions). If (loss), enter -0- in $oldsymbol{1}$	1 1		
	=	. <u> </u>	1	3		
P:			uced Tax on Net Investment I	come		
Wa		·	outable amount of any year in the b	ase perio	d?	Yes X No
_						
1	(a)		; see the instructions before making	g any ent	ries.	
	Base period years	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets		Distribution ra	
Ca	elendar year (or tax year beginning in)			ļ	(col (b) divided by	
	2013	13,335.	330,069.			0.040401
	2012	17,370.	294,576.			0.058966
	2011	11,973.	289,988.	ļ	· · · · · · · · · · · · · · · · · · ·	0.041288
	2010	11,756.	265,285.	ļ		0.044315
	2009	14,655.	238,514.			0.061443
2	Total of line 1, column (d)		2		0.246413
3		for the 5-year base period - divide				
•		·	s than 5 years	3		0.049283
	number of years the foun	dation has been in existence if les	s than 5 years			0.045203
						365 000
4	Enter the net value of nor	ncharitable-use assets for 2014 fro	om Part X, line 5	4		365,889.
5	Multiply line 4 by line 3.			5		18,032.
				ĺĺ		
6	Enter 1% of net investmen	nt income (1% of Part I, line 27b)		6		<u>446.</u>
7	Add lines 5 and 6			7		18,478.
•	, ad inico o dild o 1 ; 1 ;					
8	Enter qualifying distribution	one from Post VII. U A		8		16,250.
• 			in Part VI, line 1b, and complete		using a 1% tax	

Form !	990-PF (2014) 77 - 6204532 77 - 6204532		_ P	age 4
Part	Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see	nstru	ctions	s)
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		8	<u> 393.</u>
	here and enter 1% of Part I, line 27b			
C	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of J			
	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			
3	Add lines 1 and 2			<u> 393.</u>
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 4			<u>ION</u> E
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0		8	<u> 393.</u>
6	Credits/Payments:			
а	2014 estimated tax payments and 2013 overpayment credited to 2014 6a 1,032 .			
b	Exempt foreign organizations - tax withheld at source			
c	Tax paid with application for extension of time to file (Form 8868) 6c NONE			
ď	Backup withholding erroneously withheld 6d			
7	Total credits and payments. Add lines 6a through 6d		1,0	32.
8	Enter any penalty for underpayment of estimated tax. Check here If Form 2220 is attached			
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed			
10	Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid		1	<u> 139.</u>
11	Enter the amount of line 10 to be Credited to 2015 estimated tax ► 139. Refunded ► 11			
	VII-A Statements Regarding Activities	т—т	—-	
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it		Yes	No
	participate or intervene in any political campaign?	1a		X
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see			١,
	Instructions for the definition)?	1b		X
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials		}	}
	published or distributed by the foundation in connection with the activities.			١,
	Did the foundation file Form 1120-POL for this year?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year))		
	(1) On the foundation \$			
е	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on		Ì	Ì
_	foundation managers > \$			v
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2		<u> X</u>
_	If "Yes," attach a detailed description of the activities.))		
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of			l v
4-	incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3 4a		$-\frac{x}{x}$
4a ⊾	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4b		
5	If "Yes," has it filed a tax return on Form 990-T for this year?	5		— X
9	If "Yes," attach the statement required by General Instruction T			
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:			İ
·	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	Х	
7	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	7	X	1
8а	Enter the states to which the foundation reports or with which it is registered (see instructions)			
	CA			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General	_	ι,	[
_	(or designate) of each state as required by General Instruction G? If "No," attach explanation	8b	X	<u> </u>
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,"		ľ	.,
	complete Part XIV	9		X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their	_		Х
	names and addresses	10		ıΛ

Part VIMS Statements Regarding Activities (continued)		77-0204332			
meaning of section 512(bit13)* if 1 Yes, statch schedule (see instructions). 11 Did the foundation make a distribution to a donor advised fund over which the foundation or a discualished person had advisory privileges? If Yes, "statch statement (see instructions). 12 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? 13 Website address >	Par	t VII-A Statements Regarding Activities (continued)			
12 Did the foundation make a distribution to a denor advised fund over which the foundation or a disqualified person person had advisory privileges? If Yes,* stach statement (see instructions)	11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the			
person had advasory privileges? If "Yes," attach statement lisee instructional. 3 Did the foundation comply with the public respection requirements for its annual returns and exemption application? Website address \(\) \(N \) \\ \ \ \) \\ \ \ \ \ \ \ \ \ \ \ \			11		X
13 Dit the foundation comply with the public inspection requirements for its annual returns and exemption application? 13 X	12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified			
N/A No books are making of N/A No No No No No No No N			12		<u>X</u>
14 The books are in care of ▶	13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	L
14 The books are in care of ▶ MUSE UNLON BANK, N.A. Located at ₱ 1021 ANGAPA STREET, SANTA BARBARA, CA 2P+4 ▶ 33101. 15 Section 4947(a)(1) nonexempt chariable trusts filing Form 990-PF in leve of Form 1041. Check here . ▶ 15 16 At any time during calendar year 2014, did the foundation have an interest in or a signature or other authoriny over bank, securities, or other financial secount in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114, (formerly TD F 90:22.1). If Yes, enter the name of the foreign country ▶ Part VIIS 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. 1a During the ward dute foundation (either directly or indirectly). (1) Engage in the sale or exchange, or lessing 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 for accept them from) a disqualified person? . Yes No. (4) Pay compensation to, or pay or remitives the expenses of, a disqualified person? . Yes No. (5) Transfer any income or assets to 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. (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. (6) Agree to pay money or property to a government official? (Exception, Check "No" if the foundation of government service, if terminating within 90 days.) . Yes No. (7) Transfer any income or assets to a disqualified person of the pay in the p					
15 Section 4947/ali]1) nonexempt charable trusts filing Form 990-PF in lieu of Form 1041. Check here	14	The books are in care of ► MUFG UNION BANK, N.A. Telephone no ► (805) 564	-621	1	
And enter the amount of tax-exempt interest received or accrued during the year. 6 At any time during calendar year 2014, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN form 114, (formerly TD F 90-22 1). If Yes," either the name of the foreign country! Part VIIB 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. 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? (2) Borrow money from, lend money to, or otherwise stend credit to for accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person for make any of either available for the benefit or use of a disqualified person? (6) Agree to pay money or property to a government official? (Exception, Check "No" if the foundation of government service, if terminaring within 90 days.). b if any answer is "Yes" to 14(1+6), did any of the acts fall to qualify under the exceptions described in Regulations section 52 494 (1-b) a or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here. c Did the foundation denie first day of the tax year beginning in 2014? 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(i)(3) or 4942(i)(3					
16 At any time during calendar year 2014, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114, (formerly TD F 90-22 1). If Yes, enter the name of the foreign country P Part VII-8 Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 fany item is checked in the "Yes" column, unless an exception applies. 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?	15			>	\cdot
See the instructions for exceptions and filing requirements for FinCEN Form 114, (formerly TD F 90-22 1). If Yes, anter the name of the foreign country ► Part VIES Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 flany titem is checked in the "Yes" column, unless an exception applies. 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, land money to, or otherwise extend credit to for accept it 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? 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.). b) If any answer is "Yes" to 1aft/16d, did any of the acts fail to qualify under the exception described in Regulations section \$494 (16) are in a current notice regarding disaster assistance clear instructions?) Yes No Organizations relying on a current notice regarding disaster assistance she instructions? Organizations relying on a current notice regarding disaster assistance she instructions? Yes No Organizations relying on a current notice regarding disaster assistance she instructions? Yes No Organizations relying on a current notice regarding disaster assistance she instructions? Yes No Organizations relying on a current notice regarding disaster assistance she instructions? Yes No Organizations relying on a current notice regarding disaster assistance she instructions. c) Difference of the first day of the tax year beginning in 2014? 2 Taxes on failure to distribute income (section 4942(i)(6)) in a property of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the					т
See the instructions for exceptions and filing requirements for FinCEN Form 114, (formerly TD F 90·22 1). If "Yes," enter the name of the foreign country ▶ Part VIEB 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. 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?	16	At any time during calendar year 2014, did the foundation have an interest in or a signature or other authority	1	Yes	
Part VILB 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. 1a During the year did the foundation (either directly or indirectly) (1) Engage in the safe or exhange, or leasing of property with a disqualified person? Yes X No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? Yes X No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes X No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes X 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 X 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 X No bif any answer is "Yes" to 1st(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 check here		· · · · · · · · · · · · · · · · · · ·		L	<u>X</u>
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 1 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?		See the instructions for exceptions and filing requirements for FinCEN Form 114, (formerly TD F 90-22 1). If	ļ		
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 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?			<u> </u>		<u> </u>
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?	Par				
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?		File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.	ļ	Yes	No
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from a disqualified person?	1 a		ľ	ļ	
disqualified person?. (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?. (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (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)? (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.). 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(a)-3 or in a current notice regarding disaster assistance (see instructions)? Crganizations 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? 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([1](3) or 4942([15]): 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 b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(al(2) to all years listed, answer "No" and attach statement -see instructions.) 3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year. 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 peniod (or longer period approved by the Commissioner under section 4943(al(7)) to dispose of holdings acquired by gift or b				Ì	}
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?		·		Ì	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?					
(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)?. (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.). (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.). (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation of government service, if terminating within 90 days.). (7) Ves No (8) No (8) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation of government service, if terminating within 90 days.). (8) Ves No (9) No (10) The foundation accurate those regarding disaster assistance (see instructions)? (11) 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? (11) The foundation defined in section 4942(i)(3) or 4942(i)(5)): (12) Taxes on failure to distribute income (section 4942(i)(5)): (13) At the end of tax years (13) the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? (12) At the end of tax years (13) the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? (13) At the end of tax years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) to all years listed, answer "No" and attach statement -see instructions.) (14) Agaphyring section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here (15) Agaphyring section 4942(a)(2) are being applied t		(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes X No		Ì	}
the benefit or use of a disqualified person)? (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.). 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)? Crganizations 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? 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(ji(3) or 4942)(ji(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? 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.) 3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? 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 4942(a)(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) 4a Did the foundation invest duri		(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?)	ļ
(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.}					ļ
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.)		the benefit or use of a disqualified person)?			<u> </u>
termination of government service, if terminating within 90 days.]		(6) Agree to pay money or property to a government official? (Exception. Check "No" if the			
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section 53 4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?		termination of government service, if terminating within 90 days.)	İ	ĺ	Ì
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 20147. 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? 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? (lif applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here 3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? 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 hade excess business holdings in 2014) 4a Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purposes? b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purposes? b Did the foundation hade any investment in a prior year (but after December 31, 1969) that could jeopardize its	b	olf any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations	1	l	
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?		section 53 4941(d)-3 or in a current notice regarding disaster assistance (see instructions)7	1b		<u>X</u>
were not corrected before the first day of the tax year beginning in 2014? 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(i)(3) or 4942(i)(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?		Organizations relying on a current notice regarding disaster assistance check here		i	
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?	c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that			
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?		were not corrected before the first day of the tax year beginning in 20147	1c	<u> </u>	X
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?	2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private	ļ		
6e, Part XIII) for tax year(s) beginning before 2014?		operating foundation defined in section 4942(j)(3) or 4942(j)(5)):			
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.) c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here	а	At the end of tax year 2014, did the foundation have any undistributed income (lines 6d and			
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.)		6e, Part XIII) for tax year(s) beginning before 20147	[[
(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.)		If "Yes," list the years 🕨	ĺ	[
all years listed, answer "No" and attach statement - see instructions.) c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here	b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2)		Ì	}
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here					
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?		all years listed, answer "No" and attach statement - see instructions.)	2b		<u>X</u>
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	C	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here	l	l	
at any time during the year?		—————————————————————————————————————	}	}	
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)	3 a	· · · · · · · · · · · · · · · · · · ·		}	
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)		at any time during the year?	ļ]
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). 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2014? 4b X	b	olf "Yes," did it have excess business holdings in 2014 as a result of (1) any purchase by the foundation or	İ		
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)					
foundation had excess business holdings in 2014)			[1	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?4aXb 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?4bX			1		
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2014? 4b X		foundation had excess business holdings in 2014 }	3b		
charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2014? 4b X	4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	<u> </u>	_X_
	b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its	[
		charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2014?			

Par	VII-B Statements Regarding Activities for	or Which Form 4	720 May Be Req	uired (continued)		
5a	During the year did the foundation pay or incur any amou	int to				
	(1) Carry on propaganda, or otherwise attempt to influen		n 4945(e))?	. Yes X No		
	(2) Influence the outcome of any specific public ele					
	directly or indirectly, any voter registration drive?					
	(3) Provide a grant to an individual for travel, study, or ot	ther similar purposes?		. Yes X No		
	(4) Provide a grant to an organization other than a					
	section 4945(d)(4)(A)? (see instructions)			. Yes X No		
	(5) Provide for any purpose other than religious, ch	arıtable, scientific, İ	iterary, or educationa	al		
	purposes, or for the prevention of cruelty to children			1 1 11		
b	If any answer is "Yes" to 5a(1)-(5), did any of the	transactions fail to	qualify under the e	xceptions described in		
	Regulations section 53 4945 or in a current notice regard				5b	
	Organizations relying on a current notice regarding disast	ter assistance check l	here	>		1
С	If the answer is "Yes" to question 5a(4), does the	foundation claim e	xemption from the t	ax		
	because it maintained expenditure responsibility for the g	grant?		. Yes No		
	If "Yes," attach the statement required by Regulations sec					
6a	Did the foundation, during the year, receive any fun	ds, directly or indire	ectly, to pay premiui	ms		
	on a personal benefit contract?			Yes X No		
b	Did the foundation, during the year, pay premiums, direct	ly or indirectly, on a p	personal benefit contra	act?	6b	X
	If "Yes" to 6b, file Form 8870					
7a	At any time during the tax year, was the foundation a par	ty to a prohibited tax	shelter transaction?.	. Yes X No		İ
b	If "Yes," did the foundation receive any proceeds or have				7b	
Par	Information About Officers, Director and Contractors	rs, Trustees, Fou	ndation Manager	s, Highly Paid Emp	loyees,	
1	List all officers, directors, trustees, foundation ma	nagers and their o	compensation (see	instructions).		
	(a) Name and address	(b) Title, and average hours per week	(c) Compensation (If not paid,	(d) Contributions to employee benefit plans	(e) Expense	
		devoted to position	enter -0-)	and deferred compensation	other allov	vances
	UNION BANK N.A	CO-TRUSTEE				
	X 45174, SAN FRANCISCO, CA 94145-0174	1	5,491.	-0-		<u>-0-</u>
	A. BERRYHILL	CO-TRUSTEE				_
1505	E. VALLEY ROAD, Suite B, SANTA BARBARA,, CA 931	11	5,401.	-0-		-0-
2	Compensation of five highest-paid employees	lother than thes	s included on lin	a 1 and instruction	no) If no	o ontor
2	"NONE."	(Other than thos	e mciacea on an	e i - see ilistractio	115]. 11 1101	ie, eiitei
		(b) Title, and average		(d) Contributions to employee benefit	(e) Expense	account
(a)	Name and address of each employee paid more than \$50,000	hours per week devoted to position	(c) Compensation	plans and deferred	other allov	
				compensation		
NON	R		NONE	NONE	NO	NF
1011	<u> </u>	· · · ·	NONE	NONE	110	
						
			·			
		L		·	NO	

'ac	ıe	•
'80	le	•

Part VIII Info	ormation About Officers, Directors, Trustees, Foundation Ma d Contractors <i>(continued)</i>	anagers, Highly Paid Employ	yees,
3 Five highes	t-paid independent contractors for professional services (see instr	uctions). If none, enter "NONE	"
	(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
			NONE
NONE		-	NONE
Total number of	others receiving over \$50,000 for professional services	▶	NONE
Part IX-A S	ummary of Direct Charitable Activities		
List the foundatio organizations and	n's four largest direct charitable activities during the tax year. Include relevant statistics other beneficiaries served, conferences convened, research papers produced, etc	al information such as the number of	Expenses
1 NONE			
2			
3			
4			
	ummary of Program-Related Investments (see instructions)		
	argest program-related investments made by the foundation during the tax year on lines 1	and 2	Amount
1NONE			
2			
All other program-	related investments. See instructions		
3NONE			
			
Total, Add lines	i through 3		

Part	Minimum Investment Return (All domestic foundations must complete this part. For see instructions.)	reign founda	tions,
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc	.,	
	purposes:	}	
а	Average monthly fair market value of securities	1a	363,912.
b		1b	7,549.
C	Fair market value of all other assets (see instructions)	1c	NONE_
d	Total (add lines 1a, b, and c)		371,461.
е	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation)		
2	Acquisition indebtedness applicable to line 1 assets	2	NONE
3	Subtract line 2 from line 1d	3	371,461.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, se	e	
	instructions)		5,572.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line	4 5	365,889.
6	Minimum investment return. Enter 5% of line 5	. 6	18,294.
Part	Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating for and certain foreign organizations check here ► and do not complete this part.)	undations	
1	Minimum investment return from Part X, line 6	. 1	18,294.
2a	Tax on investment income for 2014 from Part VI, line 5	3.	
b	Income tax for 2014. (This does not include the tax from Part VI.)	\neg	
c	Add lines 2a and 2b	2c	893.
3	Distributable amount before adjustments. Subtract line 2c from line 1		17,401.
4	Recoveries of amounts treated as qualifying distributions	,	NONE
5	Add lines 3 and 4		17,401.
6	Deduction from distributable amount (see instructions), ,		NONE
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XII		
	line 1		17,401.
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		16,250.
b	Program-related investments - total from Part IX-B	. 1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc	., }	
	purposes	. 2	NONE
3	Amounts set aside for specific charitable projects that satisfy the:		
а	Suitability test (prior IRS approval required)	3a	NONE
b	Cash distribution test (attach the required schedule)	3b	NONE
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line		16,250.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment incom	e.	
	Enter 1% of Part I, line 27b (see instructions)		N/A
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	16,250.
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when qualifies for the section 4940(e) reduction of tax in those years.		

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Remaining amount distributed out of corpus . Sexess distributions carryover applied to 2014 . NONE	Pa	t XIII Undistributed Income (see instru	ctions)			
Ine 7			(a)			• •
2 Undestributed income, if any, as of the end of 2014 a Enter amount for 2013 only	'					17.401.
a Enter amount for 2013 only Description provides a provided by the second of the se	2					
Preside proneyers 20 12 , 20		· ·		Ì	8,504.	
3 Excess distributions carryover, if any, to 2014: a From 2009				NONE		
From 2009 NONE From 2010 NONE From 2011 NONE From 2012 NONE From 2013 NONE From 2013 NONE From 2013 NONE From 2013 NONE From 2013 NONE From 2013 NONE From 2013 NONE From 2013 NONE From 2014 NONE From 2015 NONE From 2015 NONE From 2015 NONE From 2015 NONE From 2016 NONE From 2016 NONE From 2016 NONE From 2016 NONE From 2016 NONE Applied to 2013, but not more than line 2. Applied to undistributed none of prory years iffection required -see instructions) From 2012 NONE From 2014 Applied to 2014 distributative amount Remaining amount distributed out of corpus From 2014 NONE From 2014 Applied to 2014 distributative and the same amount must be shown in column (st.) From 2014 NONE From 2015 NONE From 2015 NO						
b From 2010 . NONE c From 2011 . NONE d From 2012 . NONE 1 Total of Ihens 3a through e						
From 2011 . NONE If From 2012 . NONE From 2012 . NONE I Total of lines 3a through e . NONE 1 Total of lines 3a through e . NONE 1 Total of lines 3a through e . NONE 1 Total of lines 3a through e . NONE Applied to 2013, but not more than line 2a . 8,504 . Applied to undistributed income of pror years (Election required - see instructions) . NONE Treated as distributions out of corpus (Election required - see instructions) . NONE Applied to 2014 distributable amount . NONE Remaining amount distributed out of corpus . NONE Excess distributions carryover applied to 2014 (iff an amount appears in column (a), the same amount must be shown in column (a), the same amount must be shown in column (a), the same amount must be shown in column (a), the same amount must be shown in column (a), the same amount must be shown in column (a), the same amount must be shown in column (a), the same amount must be shown in column (a), the same amount must be shown in column (a), the same amount must be shown in column (a), the same amount must be shown in column (a), the same amount must be shown in column (a), the same amount must be column (a), the same amount is ensured to prove years undistributed income for which a notice of deficiency has been rissued, or on which the section 4942(a) tax has been previously assessed . NONE 4 Subtract line 6 from line 6 b Taxable amount is ensured to a startibuted income for 2014. Subtract lines 4 afrom line 2 1 Taxable amount see instructions . NONE 1 Undistributed income for 2014. Subtract lines 4 afrom line 2 1 Taxable amount see instructions . NONE 2 Lecess from 2012 in NONE 3 Excess from 2011 in NONE 4 Excess from 2011 in NONE 5 Excess from 2011 in NONE 6 Excess from 2011 in NONE 6 Excess from 2011 in NONE 6 Excess from 2011 in NONE 6 Excess from 2011 in NONE 7 Rough from line 2 Taxable amount as a seminative from 2015 in NONE 8 Excess from 2011 in NONE 9 Excess from 2011 in NONE						
d From 2012 NONE From 2013 NONE 1 Total of himes 3a through a						
From 2013 . NONE 1 Total of lines 3 at brough e . NONE 1 Total of lines 3 at brough e . NONE 2 Applied to undistributed income of prior years (Election required - see instructions) . NONE 3 Applied to undistributed income of prior years (Election required - see instructions) . NONE 4 Applied to duristributed amount . Remaining amount distributed out of corpus . NONE 5 Excess distributions carryover applied to 2014 . NONE 6 Enter the net call of each column as indicated below: a Corpus Add lines 3f, 4c, and 4e Subtract line 4 fine the net call of each column as indicated below: b Prior years' undistributed income. Subtract line 4b from line 2b research as been insued, or on which the section 4942(a) tax has been previously assessed . NONE 4 Subtract line 6e from line 6b Taxable amount . see instructions in line 2 a Taxable amount . see instructions in line 2 a Taxable amount . see instructions of the same that the substitution is corpus to satisfy requirements imposed by section 170(b)(11)(f) or 4942(a)(3) (Election may be required - see instructions). NONE 5 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions). NONE 6 Excess distributions carryover to 2015. Subtract lines 4 from line 7 (see instructions). NONE 6 Excess from 2011 . NONE 6 Excess from 2011 . NONE 6 Excess from 2011 . NONE 6 Excess from 2011 . NONE 6 Excess from 2013 . NONE		NONE				
4 Qualifying distributions for 2014 from Part XII, line 4: ₱ \$ 16,250. a Applied to 2013, but not more than hine 2a. \$ 8,504. b Asplied to undistributed income of prior years (election required - see instructions). c Treated as distributions out of corpus (Election required - see instructions). d Applied to 2014 distributable amount. e Remaining amount distributed out of corpus. Excess distributions carryover applied to 2014. Iff an amount appears in column (a), the same amount manual see shown in column (a). 6 Enter the net total of each column as indicated below: a Corpus Add lines 3f, 4c, and 4e. Subtract line 5. b Prior years' undistributed income. Subtract line 4 b from line 2b. C Enter the amount of prior years' undistributed income for which a notice of deficiency has been insued, or on which the section 942(a) tax has been previously assessed. 4 Subtract line 6c from line 6b. Taxable amount - see instructions. d Undistributed income for 2012 Subtract line 4 are from line 2. Taxable amount - see instructions. 4 Undistributed income for 2014 Subtract lines 4 are from line 2. Taxable amount - see instructions. 5 Undistributed income for 2014 Subtract lines 4 are from line 2. Taxable amount - see instructions. 6 Undistributed income for 2014 Subtract lines 4 are from line 2. Taxable amount - see instructions. 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(bit1)(F) or 4942(g)(3) (Election may be required - see instructions). 8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions). 9 Excess from 2010 . NONE Excess from 2011 . NONE Excess from 2011 . NONE Excess from 2011 . NONE Excess from 2013 . NONE						
4. Qualifying distributions for 2014 from Part XII, line 4: ▶ \$ 16,250. a Applied to 2013, but not more than line 2a. b Applied to undistributed income of prior years (Election required - see instructions). c Treated as distributions out of corpus (Election required - see instructions). d Applied to 2014 distributable amount. e Remaining amount distributed out of corpus 5 Exess distributions carryover applied to 2014. (If an amount appears in column (a).) 6 Enter the net total of each column as indicated below: a Corpus Add lines 3f, 4c, and 4e Subtract line 5 b Prior, years' undistributed income. Subtract line 4b from line 2b. c Enter the amount of prior years' undistributed income for which a socious of 4942(a) to the section 1942(a) t			NONB		_	
a Applied to 2013, but not more than line 2a. b Applied to undistributed income of prior years (Election required - see instructions). c Treated as distributions out of corpus (Election required - see instructions). d Applied to 2014 distributable amount Applied to 2014 distributable amount Remaining amount distributed out of corpus Excess distributions carryover applied to 2014. If an amount appears in column (al.) Enter the net total of each column as indicated below: a Corpus Add lines 3f, 4c, and 4e Subtract line 5 b Prior years' undistributed income. Subtract line 4b from line 2b. c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously sessesed. d Subtract line 6c from line 6b Taxable amount - see instructions. d Subtract line 6c from line 6b Taxable amount - see instructions. f Undistributed income for 2013 Subtract line 4a from line 2a Taxable amount - see instructions. f Undistributed income for 2014 Subtract line 4d from line 2a Taxable amount - see instructions. Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(bil11kF) or 4942(g)(3) (Election may be required esee instructions). Amounts treated as distributions carryover from 2009 not applied on line 5 or line 7 (see instructions). NONE Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions). NONE Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions). NONE Excess from 2011 . NONE Excess from 2011 . NONE Excess from 2011 . NONE Excess from 2012 . NONE Excess from 2013 . NONE		Qualifying distributions for 2014 from Part XII,				
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(Election required -see instructions). c Treated as distributions out of corpus (Election required -see instructions). d Applied to 2014 distributable amount. Remaining amount distributed out of corpus. Excess distributions carryover applied to 2014. If an amount appears in column (d), the same amount must be shown in column (a).) Enter the net total of each column as indicated below: a Corpus Add lines 31, 4c, and 4e Subtract line 5 Prior years' undistributed income. Subtract line 4 from line 2b Finer which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously sesseed. d Subtract line 6c from line 6b Taxable amount use instructions. d Undistributed income for 2013 Subtract lines 4 as from line 2 as Taxable amount - see instructions. Undistributed income for 2014 Subtract lines 4 as from line 7 as Taxable amount - see instructions. I Undistributed income for 2014 Subtract lines 4 as from line 2 as Taxable amount - see instructions. I Undistributed income for 2014 Subtract lines 4 as from line 1 This amount must be distribution and 5 from line 1 This amount must be distributed in 2015. 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). NONE Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions). NONE Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions). NONE B Excess from 2010 NONE B Excess from 2011 NONE C Excess from 2011 NONE C Excess from 2011 NONE						
c Treated as distributions out of corpus (Election required - see instructions)	D			NONE		
required - see instructions)						
d Applied to 2014 distributable amount Remaining amount distributed out of corpus Excess distributions carryover applied to 2014 Iff an amount appears in column (d), the same amount must be shown in column (a), Enter the net total of each column as indicated below: a Corpus Add lines 3f, 4c, and 4e Subtract line 5 b Pror years' undistributed income. Subtract line 4b from line 2b Enter the amount of prior years' undistributed income for which a notice of deficiency has been insued, or on which the section 4942(a) tax has been previously assessed . 4 Subtract line 6c from line 6b Taxable amount see instructions . Undistributed income for 2013 Subtract line 4a from line 2a Taxable amount see instructions . 4 Undistributed income for 2014 Subtract lines 4d and 5 from line 1 This amount must be distributed m 2015 . 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 17/01b/11/fb) or 4942(g)(3) (Election may be required -see instructions) . 8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions) . 8 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a . 9 Analysis of line 9 . Excess from 2010 . NONE Excess from 2011 . NONE Excess from 2011 . NONE Excess from 2011 . NONE Excess from 2012 . NONE Excess from 2013 . NONE	·		NONE			
e Remaining amount distributed out of corpus . 5 Excess distributions carryover applied to 2014 . Iff an amount appears in column (d), the same amount must be shown in column (al). 6 Enter the net total of each column as indicated below: a Corpus Add lines 3f, 4c, and 4e Subtract line 5 b Prior years' undistributed income. Subtract line 4b from line 2b . Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942a tax has been previously assessed . d Subtract line 6c from line 6b Taxable amount - see instructions . e Undistributed income for 2013 Subtract line 4a from line 2a Taxable amount - see instructions . f Undistributed income for 2014 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015 . 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170bil1/IF) or 4942(g)(3) (Election may be required - see instructions) . 8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions) . 9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a . Analysis of line 9 a Excess from 2011	d					7,746.
5 Excess distributions carryover applied to 2014 (If an amount appears in column (a), the same amount must be shown in column (a), the same amount must be shown in column (a), the same amount must be shown in column (a), the same amount must be shown in column (a), the same amount must be shown in column (a), the same amount must be shown in column (a), the same amount must be shown in column (a), the same 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			NONE			
(If an amount appears in column (d), the same amount must be shown in column (a).] Enter the net total of each column as indicated below: a Corpus Add lines 3f, 4c, and 4e Subtract line 5 b Prior years' undistributed income. Subtract line 4b from line 2b Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed d Subtract line 6c from line 6b Taxable amount - see instructions			NONE			NONE
a Corpus Add lines 3f, 4c, and 4e Subtract line 5 b Prior years' undistributed income. Subtract line 4b from line 2b c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed	6	amount must be shown in column (a).) Enter the net total of each column as				
b Prior years' undistributed income. Subtract line 4b from line 2b c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed. d Subtract line 6c from line 6b Taxable amount - see instructions. Undistributed income for 2013 Subtract line 4a from line 2a Taxable amount - see instructions. 1 Undistributed income for 2014 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015. Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions). 8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions). 9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a. NONE 10 Analysis of line 9. a Excess from 2010 NONE b Excess from 2011 NONE c Excess from 2012 NONE d Excess from 2013 NONE			NONE			
In the 4b from line 2b			NONB			
income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		line 4b from line 2b		NONE		
amount - see instructions	С	income for which a notice of deficiency has been issued, or on which the section 4942(a)		NONE		
e Undistributed income for 2013 Subtract line 4a from line 2a Taxable amount - see instructions	d	Subtract line 6c from line 6b Taxable				
4a from line 2a Taxable amount - see instructions		amount - see instructions		NONE		
4d and 5 from line 1 This amount must be distributed in 2015	е	4a from line 2a Taxable amount - see				
distributed in 2015	f	1		į	ĺ	
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)						9,655.
to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	7					
required - see instructions)		·				
8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions) NONE 9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a NONE 10 Analysis of line 9. a Excess from 2010 NONE b Excess from 2011 NONE c Excess from 2012 NONE d Excess from 2013 NONE		170(b)(1)(F) or 4942(g)(3) (Election may be				
applied on line 5 or line 7 (see instructions). NONE Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a. NONE Analysis of line 9. Excess from 2010		· · · · · · · · · · · · · · · · · · ·	NONE			
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a	8		NONE			
Subtract lines 7 and 8 from line 6a	۵					
10 Analysis of line 9 NONE a Excess from 2010	3		NONE			
a Excess from 2010 NONE b Excess from 2011 NONE c Excess from 2012 NONE d Excess from 2013 NONE	10	ı				
b Excess from 2011						
c Excess from 2012						
d Excess from 2013 NONE		1				
		——————————————————————————————————————				
						

Pai	rt XIV Private Op	erating Foundations	s (see instructions a	nd Part VII-A, quest	ion 9)	NOT APPLICABL	
1 a	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						
b	Check box to indicate v		is a private operating		n section 494	12(j)(3) or 4942(j)(5)	
2 a	Enter the lesser of the ad-	Tax year	4110040	Prior 3 years	(4) 2011	(e) Total	
	justed net income from Part I or the minimum investment	(a) 2014	(b) 2013	(c) 2012	(d) 2011		
	return from Part X for each	1					
	year listed		 	<u> </u>	 		
	85% of line 2a				 		
E	Qualifying distributions from Part XII, line 4 for each year listed .				1		
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	{ 	ļ	ļ	-		
	(2) Value of assets qualifying under section						
	4942(j)(3)(B)(i)	ļ	<u></u>		- 		
b	'Endowment" alternative test- enter 2/3 of minimum invest-						
	ment return shown in Part X,						
	line 6 for each year listed	ļ					
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)			 			
	public and 5 or more						
	exempt organizations as provided in section 4942		[
	(j)(3)(B)(iii)			ļ	 		
	port from an exempt						
	organization						
Pa	rt XV Supplemer	ntary Information (Complete this par	t only if the foun	dation had \$5,00	00 or more in assets	
	at any time	e during the year - s	ee instructions.)				
1	Information Regarding	=					
a	List any managers of before the close of any	the foundation who	have contributed mor	e than 2% of the to	tal contributions red	ceived by the foundation	
		y tax year (but only ii ti	ney have contributed i	note than \$5,000). It	see section 507(0)(2	-1-1	
	NONE						
b	connership of a partner					ally large portion of the	
		ship of other entity, o	willen the loundation	inas a 10% of greate	i interest		
	NONE						
2	Information Regarding	Contribution Grant	Gift Loan Scholarsh	in. etc Programs:			
_	<u> </u>	-		•	ritable organization	s and does not accept	
	unsolicited requests f	or funds. If the found	ation makes gifts, gra	ants, etc. (see instru	ctions) to individual	s and does not accept is or organizations unde	
	other conditions, comp						
a	The name, address, an	d telephone number o	or e-mail address of the	person to whom ap	plications should be	addressed:	
	SEE STATEMENT	•		,	•		
b	The form in which app		bmitted and information	on and materials they	should include:		
	SEE ATTACHED STATEMENT FOR LINE 2						
C	Any submission deadli	nes:			 		
	SEE ATTACHED S'		INE 2				
d	Any restrictions or li	mitations on awards,	, such as by geogra	phical areas, charit	able fields, kınds o	of institutions, or other	
	SEE ATTACHED S'	TATEMENT FOR L	INE 2				
JSA	222 111 1110111111 0					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 Purpose of grant or contribution Amount Amount Amount Purpose of grant or contribution								
Recipient	Recipient If recipient is an individual, show any relationship to status of contribution any foundation manager							
Name and address (home or business)	any foundation manager or substantial contributor	recipient	contribution	Amount				
a Paid during the year		}	1					
i		{						
SEE SCHEDULE ATTACHED		[
	NONE	EXEMPT	CHARITABLE	8,750.				
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Total	<u> </u>	l		8,750.				
b Approved for future payment	 		3a	0,730.				
b Approved for fature payment								
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	<u> </u>	L	l					
Total	<u> </u>		<u></u> ▶ 3b	(

Part XVI-	Analysis of Income-Produ	cing Activ	/ities			
	mounts unless otherwise indicated.		ated business income	Excluded by	y section 512, 513, or 514	(e)
_	service revenue:	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	Related or exempt function income (See instructions.)
f		<u> </u>		.		
g Fees a	and contracts from government agencies		<u></u>			
2 Members	ship dues and assessments		<u> </u>			
	n savings and temporary cash investments	ļ		 	T 406	
	s and interest from securities			14	7,496.	
a Debt-	financed property		<u> </u>			
	ebt-financed property		 	 	<u> </u>	
	income or (loss) from personal property .			 		
	vestment income	ì	 	10	42 001	
•	ess) from sales of assets other than inventory	}	 	18	42,091.	
	me or (loss) from special events	ļ	 	 	 	
	ofit or (loss) from sales of inventory			-		
	venue. #			+	 	
		 		 		
	·	 -	 	 		
e				 	 	
	Add columns (b), (d), and (e)			 	49,587.	
	Id line 12, columns (b), (d), and (e)			· 		
(See worksho	eet in line 13 instructions to verify calcu	ulations)				
Part XVI-	Relationship of Activities	to the Ac	complishment of Ex	empt Purp	oses	
Line No.	Explain below how each activit	v for whic	h income is reported i	n column (e) of Part XVI-A contrib	uted importantly to the
▼	accomplishment of the foundation	•	· ·			
	 	·	· · · · · · · · · · · · · · · · · · ·		- 	
						·
	L					
	<u></u>					
						
						
						
			NOT APPLICABL	F		
				-		
						
						
						
				 		

	2014)	Turnella Tarantana Tarana Tarana	77-6204532	ohor!		ge 13
Part XVII	Exempt Organ	egarding Transfers To and Transact nizations	tions and Relationships with Nor	icnari	tabie	;
1 Did th	ne organization directl	ly or indirectly engage in any of the following	ng with any other organization described		Yes	No
in sec	tion 501(c) of the Co	de (other than section 501(c)(3) organizatio	ns) or in section 527, relating to political		}	l
organ	izations?				[}	}
		g foundation to a noncharitable exempt organ			}	
					1	X
				1a(2)	 	X
	transactions:				}	.,
		charitable exempt organization				X
		n a noncharitable exempt organization			i	X
		oment, or other assets		1		X
		ements , , , , , , , , , , , , , , , ,				X
		es				X
		ent, mailing lists, other assets, or paid emplo		1		X
		e above is "Yes," complete the following s			fair n	
		assets, or services given by the reporting for				
value	in any transaction or	sharing arrangement, show in column (d)	the value of the goods, other assets, or	service	s rec	eived
value	in any transaction or (b) Amount involved	sharing arrangement, show in column (d) (c) Name of noncharitable exempt organization	the value of the goods, other assets, or (d) Description of transfers, transactions, and sh	service		
value		sharing arrangement, show in column (d)	the value of the goods, other assets, or	service		
value		sharing arrangement, show in column (d)	the value of the goods, other assets, or	service		
value		sharing arrangement, show in column (d)	the value of the goods, other assets, or	service		
value		sharing arrangement, show in column (d)	the value of the goods, other assets, or	service		
value		sharing arrangement, show in column (d)	the value of the goods, other assets, or	service		
value		sharing arrangement, show in column (d)	the value of the goods, other assets, or	service		
value		sharing arrangement, show in column (d)	the value of the goods, other assets, or	service		
value		sharing arrangement, show in column (d)	the value of the goods, other assets, or	service		
value		sharing arrangement, show in column (d)	the value of the goods, other assets, or	service		
value (a) Line no		sharing arrangement, show in column (d)	the value of the goods, other assets, or	service		
value		sharing arrangement, show in column (d)	the value of the goods, other assets, or	service		
value		sharing arrangement, show in column (d)	the value of the goods, other assets, or	service		
value		sharing arrangement, show in column (d)	the value of the goods, other assets, or	service		
value		sharing arrangement, show in column (d)	the value of the goods, other assets, or	service		
value		sharing arrangement, show in column (d)	the value of the goods, other assets, or	service		

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 sect	ion 527? Yes X N			
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 exar correct, and complete Declaration of preparer (other than		and statements, and to the best of my knowledge and belief, it is tri has any knowledge			

Sign May the IRS discuss this return 07/09/2015 with the preparer shown Here (see instructions)? X Yes Date VICE PRESIDENT Date If PTIN Print/Type preparer's name Check Paid

07/09/2015 self-employed P00353001 JEFFREY E. KUHLIN Preparer Firm's name ► KPMG LLP Firm's EIN > 13-5565207 **Use Only** ▶ 2020 N CENTRAL AVE, STE 700 Firm's address PHOENIX, 85004 800-810-2207 Phone no

- DIVIDENDS AND INTEREST FROM SECURITIES FORM 990PF, PART I

NET INVESTMENT INCOME	49. 302. 6,237. 107.	7,474.
REVENUE AND EXPENSES PER BOOKS	49. 302. 22. 6,237. 107.	7,496.
DESCRIPTION	USGI REPORTED AS NONQUALIFIED DIVIDENDS FOREIGN DIVIDENDS NONDIVIDEND DISTRIBUTIONS DOMESTIC DIVIDENDS OTHER INTEREST NONQUALIFIED FOREIGN DIVIDENDS NONQUALIFIED DOMESTIC DIVIDENDS	TOTAL

STATEMENT

FORM 990PF, PART I - ACCOUNTING FEES

CHARITABLE PURPOSES	1,500.
ADJUSTED NET INCOME	NONE
NET INVESTMENT INCOME	HON
REVENUE AND EXPENSES PER BOOKS	1,500.
DESCRIPTION	TAX PREPARATION FEE (NON-ALLOC TOTALS

FORM 990PF, PART I - TAXES

NET INVESTMENT INCOME	15.
REVENUE AND EXPENSES PER BOOKS	1,032. 15. 5. 1,052.
DESCRIPTION	FEDERAL ESTIMATES - PRINCIPAL FOREIGN TAXES ON QUALIFIED FOR FOREIGN TAXES ON NONQUALIFIED

STATEMENT

FORM 990PF, PART I - OTHER EXPENSES

EXPENSES PER BOOKS REVENUE AND

10.

CHARITABLE PURPOSES

STATE FILING FEE

DESCRIPTION

10.

TOTALS

10.

10.

OJ9174 M743 07/09/2015 10:36:15

STATEMENT

4

FORM 990PF, PART II - CORPORATE STOCK

DESCRIPTION

ISHARES- CORE S&P SMALLCAP ETF VNGRD FTSE ALL-WORLD EX-US IDX GROWTH STOCK FUND- PCB, NA VALUE STOCK FUND- PCB, NA AQR MGD FUTURES STRATEGY CL ARBITRAGE FD CL EATON VANCE GLBL MACR ABSOL RE PIMCO ALL ASSET FD INSTL CL VANGUARD INTL EQUITY INDEX

TOTALS

ENDING FMV 	9,695. 11,012. 160,887. 158,237. 6,658. 6,113. 5,994.	366,141.
ENDING BOOK VALUE	5,986. 9,047. 119,978. 123,499. 6,293. 6,014. 6,000.	284,817.

921.

=========

FORM 990PF, PART III - OTHER DECREASES IN NET WORTH OR FUND BALANCE	S		
	=		
DESCRIPTION AMOUNT			
MUTUAL FUND TIMING DIFFERENCES & ROUNDING	61.		
ADJUST FOR 2013 TAX EXT PAYMENT IN 2014	860.		

TOTAL

GAINS AND LOSSES FROM PASS-THRU ENTITIES

NET SHORT-TERM GAIN (LOSS) FROM PARTNERSHIPS, S CORPORATIONS AND OTHER FIDUCIARIES

COMMON TRUST FUNDS

231.00

TOTAL NET SHORT-TERM GAIN OR LOSS (ROUNDED)

231.00

NET LONG-TERM GAIN (LOSS) FROM PARTNERSHIPS, S CORPORATIONS AND OTHER FIDUCIARIES

COMMON TRUST FUNDS

31,750.00

TOTAL NET LONG-TERM GAIN OR LOSS (ROUNDED)

31,750.00 990PF, PART VII-B LINE 2b - SECTION 4942a2 EXPLANATION STATEMENT

THIS QUESTION DOES NOT APPLY. THE FOUNDATION DOES NOT HAVE ANY UNDISTRIBUTED INCOME FROM PRIOR YEARS.

BRUCE , RONALD & PHYLLIS M. TRUST FORM 990PF, PART XV - LINES 2a - 2d

RECIPIENT NAME:

JANICE GIBBONS C/O MUFG UNION BANK, N.A.

ADDRESS:

1021 ANACAPA STREET

SANTA BARBARA, CA 93101

RECIPIENT'S PHONE NUMBER: 805-564-6211

FORM, INFORMATION AND MATERIALS:

LETTER OF INQUIRE

SUBMISSION DEADLINES:

NOVEMBER 1ST

RESTRICTIONS OR LIMITATIONS ON AWARDS:

AWARDS ARE RESTRICTED TO SANTA BARBARA

COUNTY

Bruce Foundation 2014 Grants

Dog Adoption and Welfare Group 5480 Overpass Road Santa Barbara, CA 93111 \$1,750

For implanting microchips in dogs being adopted.

Catalyst for Cats 7092 Armstrong Road Goleta, CA 93117 \$1,750

To spay & neuter cats in the Santa Ynez Valley, Guadalupe and Santa Maria.

K-9 Placement and Assistance League, Inc. (K-9 PALS) P.O. Box 60755 Santa Barbara, CA 93160-0755 \$1,750

For the K-9 PALS Medical Fund for homeless dogs of Santa Barbara County.

Santa Maria Valley Humane Society 1687 West Stowell Road Santa Maria, CA 93458 \$1,750

To help fund veterinary care for adoptable animals.

All for Animals P.O. Box 3534 Santa Barbara, CA 93130 \$1,750

For the new ARF4Kids read-to-dog program at the Santa Barbara Public Library.

Total: \$8,750

Form **8868**

(Rev. January 2014)

Department of the Treasury Internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return

► File a separate application for each return.
► Information about Form 8868 and its instructions is at www.irs.gov/form8868.

OMB No 1545-1709

 If you are 	filing for an Automatic 3-Month Extension, of	complete o	only Part I and check th	is box	► [X]
 If you are 	filing for an Additional (Not Automatic) 3-Mo	onth Exten	sion, complete only Pa	art II (on page 2 of this form).	
Do not comp	plete Part II unless you have already been gran	ited an auto	omatic 3-month extensi	ion on a previously filed Form 886	8.
a corporation 8868 to requested Return for instructions) Part I Au A corporation Part I only . All other corporations	ling (e-file). You can electronically file Form n required to file Form 990-T), or an addition quest an extension of time to file any of the Transfers Associated With Certain Persona. For more details on the electronic filing of the tomatic 3-Month Extension of Time. On n required to file Form 990-T and requesting porations (including 1120-C filers), partnership e tax returns. Name of exempt organization or other filer, see in	nal (not aut forms liste I Benefit (nis form, vis lly submit an automa 	tomatic) 3-month extended in Part I or Part II w Contracts, which mussist www.irs.gov/efile and original (no copies natic 6-month extension -	nsion of time. You can electronical with the exception of Form 8870, it be sent to the IRS in paper of dictional click on e-file for Charities & Noneeded). • check this box and complete	ly file Form Information format (see profits. informat pof time re instructions
Type or	,			Employer identification flumber (EMY) of	
print	BRUCE , RONALD & PHYLLIS M.			77-6204532	
File by the	Number, street, and room or suite no. If a P.O. box		tions	Social security number (SSN)	
due date for filing your	PO BOX 45174				
return See instructions	City, town or post office, state, and ZIP code. For	a foreign add	dress, see instructions		
matructions	SAN FRANCISCO, CA 94145-0174				
Enter the Re	turn code for the return that this application i	s for (file a	separate application fo	r each return)	0 4
Application		Return	Application		Return
ls For		Code	ls For		Code
Form 990 or	Form 990-EZ	01	Form 990-T (corporati	ion)	07
Form 990-BL	-	02	Form 1041-A		08
Form 4720 (individual)	03	Form 4720 (other tha	n indıvıdual)	09
Form 990-PF		04	Form 5227	1	
	(sec. 401(a) or 408(a) trust)	05	Form 6069	1	
Form 990-T	(trust other than above)	06	Form 8870		12
Telephone If the orga If this is for the whole a list with the	are in the care of ► MUFG_UNION_BANK No ► (805) 564-6211 Initiation does not have an office or place of bor a Group Return, enter the organization's four a group, check this box	usiness in a region of the control o	FAX No. ► the United States, checup Exemption Number rt of the group, check the	(GEN) If th	is ıs
until for the ► X	st an automatic 3-month (6 months for a corp $08/17$, 20 15 , to file the 6 organization's return for: calendar year 20 14 or tax year beginning	exempt org	anization return for the	organization named above. The ex	ktension is
CI	x year entered in line 1 is for less than 12 mo hange in accounting period				_
	application is for Form 990-BL, 990-PF, 99	0-T, 4720,	, or 6069, enter the	tentative tax, less any	
	indable credits See instructions.			3a \$	893.
D IT this	application is for Form 990-PF, 990-T,	4720, or	6069, enter any re		
estimat Ralance	ed tax payments made. Include any prior year	r overpaym	ent allowed as a credit.	. 3b \$	1,032.
	c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.				
	rare going to make an electronic funds withdrawal		Numb this Farry COCC	3c \$	
instructions.	rare going to make an electronic lunus withdrawal	taitect debi	i) with this Form 8868, se	e Form 8453-EU and Form 8879-EO fo	or payment

For Privacy Act and Paperwork Reduction Act Notice, see instructions.

Form **8868** (Rev 1-2014)