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Form 990-PF

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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

OMB No 1545-0052

2014

Open to Public Inspection

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

Name of foundation Philanthropy International		A Employer identification number 87-0643877	
Number and street (or P O box number if mail is not delivered to street address) 333 N Indian Hill Blvd		B Telephone number (see instructions) (909) 625-4511	
City or town, state or province, country, and ZIP or foreign postal code Claremont, CA 91711		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 12,434,968		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	
J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)			

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	928,760			
	2 Check ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	63,135	63,135	63,135	
	4 Dividends and interest from securities.	53,800	53,800	53,800	
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10				
	b Gross sales price for all assets on line 6a _____				
	7 Capital gain net income (from Part IV, line 2)				
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	129,063			
	12 Total. Add lines 1 through 11	1,174,758	116,935	116,935	
	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)	1,348			
	b Accounting fees (attach schedule)	1,750			
	c Other professional fees (attach schedule)				
	17 Interest	8			
	18 Taxes (attach schedule) (see instructions)	1,925			
	19 Depreciation (attach schedule) and depletion . . .	451	226		
	20 Occupancy				
	21 Travel, conferences, and meetings	350			
	22 Printing and publications	137			
	23 Other expenses (attach schedule)	185,930	84,607		
	24 Total operating and administrative expenses. Add lines 13 through 23	191,899	84,833		0
	25 Contributions, gifts, grants paid	905,511			905,511
	26 Total expenses and disbursements. Add lines 24 and 25	1,097,410	84,833		905,511
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	77,348			
	b Net investment income (if negative, enter -0-)		32,102		
	c Adjusted net income (if negative, enter -0-)			116,935	

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	693,540	2,534,070	2,534,070
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ 1,619,417 Less allowance for doubtful accounts ▶ _____	1,857,035	1,619,417	1,619,417
	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)	5,146,349	3,963,741	3,963,741
	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)	4,476,450	4,317,740	4,317,740
	14	Land, buildings, and equipment basis ▶ _____ 2,350 Less accumulated depreciation (attach schedule) ▶ _____ 1,673	1,128	677	
15	Other assets (describe ▶ _____)				
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	12,174,502	12,435,645	12,434,968	
Liabilities	17	Accounts payable and accrued expenses	1,818	3,127	
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)	61,924	61,924	
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)	63,742	65,051	
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	12,110,760	12,370,594	
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☐ and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	Total net assets or fund balances (see instructions)	12,110,760	12,370,594	
	31	Total liabilities and net assets/fund balances (see instructions)	12,174,502	12,435,645	

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 12,110,760
2	Enter amount from Part I, line 27a	2 77,348
3	Other increases not included in line 2 (itemize) ▶ _____	3 182,486
4	Add lines 1, 2, and 3	4 12,370,594
5	Decreases not included in line 2 (itemize) ▶ _____	5
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6 12,370,594

Part IV

Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a				
(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				
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				
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	
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			
2012			
2011			
2010			
2009			
2	Total of line 1, column (d).		2
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
4	Enter the net value of noncharitable-use assets for 2014 from Part X, line 5.		4
5	Multiply line 4 by line 3.		5
6	Enter 1% of net investment income (1% of Part I, line 27b).		6
7	Add lines 5 and 6.		7
8	Enter qualifying distributions from Part XII, line 4.		8
If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions			

Part VI

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

1a		Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1			
b		Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b		1642	
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	
3		Add lines 1 and 2.		3642	
4		Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	
5		Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5642	
6		Credits/Payments			
a		2014 estimated tax payments and 2013 overpayment credited to 2014		6a	983
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.		7983	
8		Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached.		8	
9		Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	
10		Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		10341	
11		Enter the amount of line 10 to be Credited to 2015 estimated tax 341 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)?		1b		No
		If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.				
c		Did the foundation file Form 1120-POL for this year?		1c		No
d		Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation \$ (2) On foundation managers \$				
e		Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$				
2		Has the foundation engaged in any activities that have not previously been reported to the IRS?		2		No
		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 incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		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		No
5		Was there a liquidation, termination, dissolution, or substantial contraction during the year?		5		No
		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				
		• 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		No
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	Yes	
8a		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 (or designate) of each state as required by General Instruction G? If "No," attach explanation .		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)? If "Yes," complete Part XIV		9		No
10		Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses.		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 www.picharity.org				
14	The books are in care of Duke Draeger Telephone no (909) 625-4511 Located at 333 N Indian Hill Blvd Claremont CA ZIP+4 91711			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here ☐ and enter the amount of tax-exempt interest received or accrued during the year.	15		
16	At any time during calendar year 2014, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	Yes	No
See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes", enter the name of the foreign country				

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? ☐ Organizations relying on a current notice regarding disaster assistance check here. ☒	1b		No
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2014?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? ☐ Yes ☒ No If "Yes," list the years 20 , 20 , 20 , 20			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions).	2b		No
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here 20 , 20 , 20 , 20			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2014 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2014.</i>)	3b		No
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		No
	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?			
	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?			
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?			
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	7b		No

Part VIII

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

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).				
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Cristina M Kidwell	Director	0		
333 N Indian Hill Blvd Claremont, CA 91711	5 00			
Duaine Draeger	Dir Finance	0		
333 N Indian Hill Claremont, CA 91711	24 00			
Tracy Haraksin	Trustee	0		
1414 Winston Ct Upland, CA 91786	40 00			
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.				

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.		

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 Support various organizations to further their charitable purposes in accordance with the wishes of donors to the Foundation. Charitable support was provided to 157 organizations	905,511
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.	

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

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	
2a	Tax on investment income for 2014 from Part VI, line 5.	2a	642
b	Income tax for 2014 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	642
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	642
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	642
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1. . . .	7	0

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	905,511
b	Program-related investments—total from Part IX-B.	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	905,511
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	
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	905,511

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				0
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only.				
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2014				
a From 2009.	634,180			
b From 2010.	683,419			
c From 2011.	11,014,403			
d From 2012.	1,442,870			
e From 2013.	939,133			
f Total of lines 3a through e.	14,714,005			
4 Qualifying distributions for 2014 from Part XII, line 4 ▶ \$ 905,511				
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).	0			
d Applied to 2014 distributable amount.				
e Remaining amount distributed out of corpus	905,511			
5 Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	15,619,516			
b Prior years' undistributed income Subtract line 4b from line 2b.				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d Subtract line 6c from line 6b Taxable amount—see instructions				
e Undistributed income for 2013 Subtract line 4a from line 2a Taxable amount—see instructions				
f Undistributed income for 2014 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)				
8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions) . . .	634,180			
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a	14,985,336			
10 Analysis of line 9				
a Excess from 2010. . . .	683,419			
b Excess from 2011. . . .	11,014,403			
c Excess from 2012. . . .	1,442,870			
d Excess from 2013. . . .	939,133			
e Excess from 2014. . . .	905,511			

Part XIV

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

1a

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

b

Check box to indicate whether the 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 XV

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

1

Information Regarding Foundation Managers:

a

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

b

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

2

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

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

a

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

Duke Draeger
333 N Indian Hill Blvd
Claremont, CA 91711
(909) 399-1100

b

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

Applications can be submitted in letter form

c

Any submission deadlines

None

d

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

Recipients must be qualified charities under Section 501(a) of the Internal Revenue Code

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	905,511
b Approved for future payment				
Total			3b	

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 <i>Paid during the year</i>				
St Dorothy's Catholic Church 241 S Valley Center Glendora, CA 91741			Support of religious practices and teachings	1,000
Tierra del Sol Foundation 9919 Sunland Blvd SunlandTujunga, CA 91040			Support relief efforts and humanitarian aid	1,000
Juvenile Diabetes Research Foundati 811 Wilshire Blvd Suite 1600 Los Angeles, CA 90017			Support research efforts toward cure for juvenile diabetes	5,000
Convelescent Aid Society 3255 E Foothill Blvd Pasadena, CA 91107			Advocacy for Elder Care	500
The Salvation Army 906 S Central St Los Angeles, CA 90015			Support shelters for homeless	7,000
St Anne's Catholic Church PO Box 190 Needles, CA 92363			Support religious teachings and activities	5,000
Trinity Presbyterian Church 1301 Osos Pkwy San Luis Obispo, CA 93401			Support religious teachings and activities	5,000
Compassion International 12290 Voyager Pkwy Colorado Springs, CO 80921			Support for education of children in third world countries	790
Coral Ridge Ministries PO Box 628222 Orlando, FL 32862			Support religious education and evangelism	2,400
Alzheimers Association 225 N Michigan Ave Chicago, IL 60601			Support research and aid to victims of Alzheimers disease	25,000
Doctors without Borders 333 7th Avenue New York, NY 10001			Support sending physicians to care for patients in third world countries	10,000
Arrowhead Christian Academy 105 Tennessee Street Redlands, CA 92373			Support Christian education	25,000
New Song Church 945 W Covina Blvd San Dimas, CA 91773			Support religious teaching and activities	7,500
Taller San Jose 801 N Broadway Santa Ana, CA 92701			Support aid for disadvantaged individuals in the community	41,500
Boys Girls Club 950 W Highland Street Santa Ana, CA 92703			Support programs for disadvantaged youth	20,000
Total  3a				905,511

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>				
Boys Girls Clubs 580 W 6th Street Tustin, CA 92780			Support activities for disadvantaged youth	5,800
Boys Girls Clubs 901 N Railroad Ave Santa Maria, CA 93458			Support programs for disadvantaged youth	744
Big Island Liturgy Arts Center 3140 Waialae Ave Honolulu, HI 96816			Support preservation of local culture	500
Blackburn College 700 College Ave 1 Carlinville, IL 62626			To support higher education	500
Spring Hills Community Church 3700 Fulton Road Santa Rosa, CA 95403			To support religious teachings and activities	10,000
Amateur Baseball Development 1710 N Moorpark Rd 106 Thousand Oaks, CA 91360			To support training of youth in the enjoyment and participation in baseball	5,000
City of Hope 1500 E Duarte Road Duarte, CA 91010			To support research on cancer treatment and cures	5,000
Immaculate Conception Monastery 802 E 10th Street Ferdinand, IN 47532			Support monastic lifestyle	1,000
American Heart Association 7272 Greenville Ave Dallas, TX 75231			Support research toward treatment and awareness of heart disease	1,250
Anteaus Company 5112 Lankershim Blvd North Hollywood, CA 91601			To encourage enjoyment and participation in theater arts	5,000
Loyola Marymount University 1 LMU Drive Los Angeles, CA 90015			Support higher education	2,500
National Multiple Sclerosis Society PO Box 4527 New York, NY 10163			Support research toward a cure for multiple sclerosis	630
Redwood Empire Food Bank 3990 Brickway Blvd Santa Rosa, CA 95403			Support programs for the poor and hungry	4,000
Union Rescue Mission 545 San Pedro Street Los Angeles, CA 90013			Support programs feeding the homeless and hungry	4,000
Universal Health Care Action Networ 2800 Euclid Ave 520 Cleveland, OH 44115			To support health care awareness	3,000
Total  3a				905,511

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>				
Born Again Ministries 5042 Wilshire Blvd Suite 32691 Los Angeles, CA 90036			Support religious education and activities	2,500
Church of the Resurrection 21060 SW Stafford Rd Tualatin, OR 97062			Support religious education and activities	1,200
Earthwatch Institute 114 Western Avenue Boston, MA 02134			Research and education regarding environmental issues	2,200
Helping Homeless Help Themselves PO Box 3363 Palos Verdes, CA 90274			Education and retraining of homeless	3,450
Huntington Memorial Hospital 100 W California Blvd Pasadena, CA 91105			Support hospital capital and operating activities	3,000
Last Chance for Animals 8033 Sunset Blvd West Hollywood, CA 90046			Support animal rescue efforts	2,000
Macular Degeneration PO Box 515 Northampton, MA 01061			Support research into treatment of macular degeneration	6,000
National Federation for the Blind 175 E Olive Ave 308 Burbank, CA 91502			Support assistance programs for the blind	3,000
Oregon Health Science Univ Fdtn 1121 SW Salmon St 100 Portland, OR 97205			Support general medical research	3,000
Sisters of Rolling Hills 28600 Palos Verdes Dr E Rcho Palos Verdes, CA 90275			Support religious activities	2,800
SPCA 5026 W Jefferson Blvd Los Angeles, CA 90016			Support efforts to prevent cruelty to animals	2,000
USC Norris Cancer Research 1441 Eastlake Ave Los Angeles, CA 90033			Support cancer research efforts	5,000
American Cancer Society 250 Williams Street NW Atlanta, GA 30303			Fund cancer research	630
Delta Animal Rescue 313 E Broadway Glendale, CA 91205			Fund animal rescue	2,500
Friendly Center 147 W Rose Ave Orange, CA 92867			Providing humanitarian support	15,000
Total  3a				905,511

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>				
Guide Dog Foundation 371 E Jericho Turnpike Smithtown, NY 11787			Provide funding for training of guide dogs for the blind	1,000
Health Access Foundation 121 W Lexington Dr Suite 246 Glendale, CA 91203			Support public access to healthcare	1,000
Loloma Foundation 549 Albion Street San Diego, CA 92106			Support humanitarian relief in Fiji	10,000
Love INC PO Box 3505 Covina, CA 91722			Provide support for those in need, encourage community outreach and support	3,000
Pat Tillman Foundation 2141 E Broadway Rd 115 Tempe, AZ 85282			Supporting military veterans and their families	2,500
Santa Ana Unified School District 1601 E Chestnut Ave Santa Ana, CA 92701			Support public education	20,600
Scholarship America 7900 International Dr Suite 500 Minneapolis, MN 55425			Support education	1,000
So Cal Amer for Democratic Action 3916 S Sepulveda Blvd Culver City, CA 90230			Encourage participation in the political system	1,250
St Mary's Academy 701 Grace Ave Inglewood, CA 90301			Support parochial education	3,000
Tulane University School of Medicin 1430 Tulane Ave New Orleans, LA 70112			Support higher education	5,000
Westlake High Football Boosters 100 N Lakeview Cyn Rd Westlake Village, CA 91362			Support extra curricular educational activities	5,000
Wounded Warrior Project PO Box 758517 Topeka, KS 66675			Support wounded veterans and their families	18,260
American Red Cross-Central Texas 2218 Pershing Dr Austin, TX 78723			Support disaster relief efforts	2,000
Austin Humane Society 124 W Anderson Lane Austin, TX 78752			Provide support to neglected and abandoned animals	1,000
Ausitn Ridge Bible Church 9300 Farm to Market 2244 Austin, TX 78733			Support religious education and activities	5,000
Total  3a				905,511

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>				
Biola University 13800 Biola Ave La Mirada,CA 90639			Support higher education	4,000
Cal Farley's Ranch PO Box 1890 Amarillo,TX 79174			Support extra-curricular education activities for underprivileged youth	50
Capital Area Food Bank 4900 Puerto Rico Ave NE Washington,DC 20017			Provide support for hungry and homeless population	2,000
Center for Child Protection 8509 FM 969 Suite 2 Austin,TX 78724			Support for victims of child sexual abuse	1,000
Coronado Hospital 250 Prospect Place Coronado,CA 92118			Provide support for medical care	5,000
Disabled American Veterans 3725 Alexandria Pike Cold Spring,KY 41076			Provide support services to those disabled in military service	2,000
LA Maritime Museum Foundation 84 E 6th Street San Pedro,CA 90731			Support education and preservation of cultural history surrounding the maritime industry in Southern California	2,000
Good News Community Church 5511 W 136th Ave Broomfield,CO 80020			Support religious education and activities	50
Illumination Foundation 2691 Richter Ave 107 Irvine,CA 92606			Support efforts to break the cycle of homelessness in Orange County, CA	15,000
Living Stones Church 445 S Virginia Street Reno,NV 89501			Support religious education and activities	8,000
Mariners Church 5001 Newport Coast Dr Irvine,CA 92603			Support religious education and activities	3,000
Meals on Wheels 1550 Crystal Drive Suite 1004 Arlington,VA 22202			Support program that provides meals to shut-ins	1,000
Missoula Gospel Assembly 201 S 3rd Street W Missoula,MT 59801			Support religious education and activities	640
Pepperdine University 24255 Pacific Coast Hwy Malibu,CA 90263			Supporting higher education	8,000
Special Olympics Texas 1804 Rutherford Lane Austin,TX 78754			Support athletic programs for individuals with disabilities	1,000
Total  3a				905,511

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>				
Sage Hill School 20402 Newport Coast Dr Newport Coast, CA 92657			Support education	3,000
Smile Train PO Box 96231 Washington, DC 20090			Provide dental care for those who can't afford it	1,000
Second Harvest Food Bank 4001 N 1st Street San Jose, CA 95134			Relief for hungry and homeless	12,200
Caltech Y 505 S Wilson Ave Pasadena, CA 91125			Promote responsible citizenship	1,000
Calvary Chapel 4201 Eucalyptus Ave Chino, CA 91710			Religious education and practice	3,000
Cedars-Sinai 8700 Beverly Blvd Los Angeles, CA 90048			Medical research	2,500
Chapelwood United Methodist Church 300 Willow Dr Lake Johnson, TX 77566			Religious education and practice	2,500
Chi Omega Foundation 3395 Players Club Pkwy Memphis, TN 38125			Education	1,000
Christian Church of Los Gatos 16845 Hicks Rd Los Gatos, CA 95032			Religious education and practice	3,000
Campus Crusade for Christ 100 Lake Hart Drive Orlando, FL 32832			Campus ministries	1,000
Cure Alzheimers Fund 34 Washington St Suite 200 Wellesley Hills, MA 02481			Alzheimers research	1,000
Families 4 Families PO Box 7122 San Jose, CA 95150			Humanitarian support for families	10,000
Grace Lutheran Church of Ophem 115 Main Street Ophem, IL 61468			Religious education and practice	200
Heart of Hope Ministries Int'l PO Box 2001 Vancouver, WA 98668			Support orphans and low income families	5,000
Himalayan Cataract Project PO Box 55 Waterbury, VT 05676			Medical blindness prevention	1,000
Total  3a				905,511

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>				
Homes for our Troops 6 Main Street Taunton,MA 02780			Veterans support	1,000
Hospice Austin 4107 Spicewood Springs Rd 100 Austin,TX 78759			Hospice care	1,000
International Rescue Committee 625 N Maryland Ave Glendale,CA 91206			International relief	1,000
Los Angeles Regional Food Bank 1734 E 41st Street Los Angeles,CA 90058			Food pantry	1,765
Neigh Savers Foundation 1547 Palos Verdes Mall Suite 259 Walnut Creek,CA 94597			Animal Services	6,500
Northeast Santa Ana Little League 2100 N Grand Ave Santa Ana,CA 92705			Youth sporting programs	5,000
Oasis Christian Church 11280 Riverside Dr North Hollywood,CA 91602			Religious education and practice	1,874
Santa Ana Public School Foundation 1601 E Chestnut Ave Santa Ana,CA 95701			Education	5,000
Save the Children 501 Kings Way E Suite 400 Fairfield,CT 06825			International disaster relief	1,000
Sierra Vista Community Church 1589 W 9th Street Upland,CA 91786			Religious education and practice	1,500
Smile Again Ministries PO Box 563 Crosslake,MN 56442			Spiritual development	1,000
St Jude Children's Hospital 262 Danny Thomas Place Memphis,TN 38105			Health services and medical research	20,000
USO PO Box 96860 Washington,DC 20077			Support of armed services personnel	2,000
Tragedy Assistance Program for Surv 3033 Wilson Blvd Ste 360 Arlington,VA 22201			Crisis intervention	1,000
Transitional Living Services 482 Black River Pkwy Watertown,NY 13601			Humanitarian support	5,000
Total  3a				905,511

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>				
Trout Unlimited 1777 N Kent St Suite 100 Arlington, VA 22209			Wetlands preservation	850
True to Life Ministries 105 This Way Street Lake Jackson, TX 77566			Financial Counseling and money management	7,500
AICR Cancer Research 1759 R St NW Washington, DC 20009			Medical research	6,000
Allegro Organizational Solutions 1113 Vine Street Houston, TX 77002			Providing consulting services to assist organizations thrive	300
Alpha K9 Service Project 7500 14th Ave 22 Sacramento, CA 95820			Support for military service dogs	800
Angels RBI League 1575 E 17th Street Santa Ana, CA 92705			Support sporting activities	5,000
Assistance League of Santa Ana 1037 W 1st Street Santa Ana, CA 92703			Support local charity organizations	1,000
Atlanta Educational Telecommunicati 740 Bismark Rd NE Atlanta, GA 30324			Provide Public Radio	300
Austin Childrens Services 4800 Manor Road Austin, TX 78723			Support of homeless children	1,000
Austin Lyric Opera 3009 Industrial Terrace 100 Austin, TX 78758			Support for the fine arts	6,335
Beta Foster Care 23276 S Pointe Dr 213 Laguna Hills, CA 92653			Support for foster care children	5,800
Bridge Church 715 Lincoln Ave Woodland, CA 95695			Religious activities	50
BSA San Diego Imperial Council 1207 Upas Street San Diego, CA 92013			Support Boy Scouting program	2,000
C-3 Center for Conscious Creativity 1201 W 5th Street Suite F80 Los Angeles, CA 90017			Support creative thought processes and learning modes	1,000
California Trout 360 Pine Street San Francisco, CA 94104			Conservancy for Trout	2,000
Total  3a				905,511

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				
Calvary Chapel Pacific Hills 24481 Moulton Pkwy Laguna Woods, CA 92637			Religious activities	2,000
Casa Teresa Inc PO Box 429 Orange, CA 92856			Homeless shelter	15,000
Catalina Island Conservancy 333 Golden Shore 170 Long Beach, CA 90802			Conservation of public lands	2,500
Christian Mission Church 27812 Forbes Road Laguna Niguel, CA 92677			Religious Activities	3,800
Citrus Valley Hospice 820 N Phillips Ave West Covina, CA 91791			Support care for the dying	2,500
Community Presbyterian Church 32202 Del Obispo Street San Juan Capistrano, CA 92675			Religious activities	600
Creatio 3290 W Milan Ave Englewood, CO 80110			Support activities for underprivileged	2,500
Drain Church of Christ 401 2nd Street Drain, OR 97435			Religious activities	160,000
Face Foward Inc 9735 Wilshire Blvd Beverly Hills, CA 90212			Support for those suffering disfigurement from domestic violence	1,000
Family Safety Foundation 235 E Clark Ave Suite C Santa Maria, CA 93455			Support family safety	25,000
Far Reaching Ministries 38615 Calistoga Drive Murrieta, CA 92563			Religious activities	3,000
Fisher House Foundation 111 Rockville Pike Suite 420 Rockville, MD 20850			Providing housing for families of people receiving treatment at hospitals Targeted for military families	1,000
Friends of Children United Society PO Box 180023 Coronado, CA 92178			Serving children to improve their lives	5,000
Heifer Project International 1 World Avenue Little Rock, AR 72202			Support to impoverished by providing livestock for farming purposes	755
Her Place Paths to Recovery 23181 Verdugo Drive Suite 104-A Laguna Hills, CA 92653			Support recovery from domestic violence	5,000
Total  3a				905,511

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>				
Heritage Foundation 214 Massachusetts Ave NE Washington, DC 20002			Conservancy of public lands	5,000
Intrepid Fallen Heroes W 46th Street and 12th Ave New York, NY 10036			Support for families of fallen service members	1,000
Kentucky Coalition 402 King Ave Fayetteville, WV 25840			Support improved living conditions	250
Laserex Cancer Foundation 50 Oak Ct 200 Danville, CA 94526			Medical research	1,000
Liberty Institute 2001 W Plano Pkwy Suite 1600 Plano, TX 75075			Promoting religious liberty and providing legal assistance	5,000
Mayo Clinic 200 First St SW Rochester, MN 55905			Medical research	100
Mission to the World PO Box 2589 Suwanee, GA 30024			Religious activities	1,800
Moorpark Vineyard Church PO Box 715 Moorpark, CA 93020			Religious activities	25,000
National WASP WWII Museum 210 Avenger Field Road Sweetwater, TX 79556			Preserving cultural heritage	4,000
Open Arms Animal Resources PO Box 2248 Imperial Beach, CA 91933			Animal rescue	3,000
Operation Children 8950 W Olympic Blvd 377 Beverly Hills, CA 90211			Support for needy children	3,300
People Assisting the Homeless 340 N Madison Ave Los Angeles, CA 90004			Assistance for the homeless	350
Rape Crisis Child Protection Servic 301 S Miller Street 103 Santa Maria, CA 93454			Support for victims of domestic violence	250
Restore Community Church 5559 NW Berry Rd 305 Kansas City, MO 64154			Religious activities	300
Ronan Thompson Foundation PO Box 44935 Phoenix, AZ 85064			Medical research	1,000
Total  3a				905,511

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>				
Royal Family Kids 3000 W MacArthur Blvd Suite 412 Santa Ana, CA 92704			Providing camping experiences for abused and abandoned children	20,000
SEE International 5638 Hollister Ave suite 210 Santa Barbara, CA 93117			Providing free surgery for restoration of sight	1,000
Save the Children 504 Kings Hwy East Suite 400 Fairfield, CT 06825			Promoting children's rights	1,000
Serving California PO Box 369 Malibu, CA 90265			Transitional services for ex-offenders	2,000
Southern California Public Radio 474 S Raymond Avenue Pasadena, CA 91105			Public radio	1,000
Stand Up to Cancer PO Box 843721 Los Angeles, CA 90084			Support for those battling cancer	20,000
St Peter Paul Church 1919 S 7th Street St Louis, MO 63104			Religious activities	200
The Bridge Church of the Christian 715 Lincoln Ave Woodland, CA 95695			Religious activities	10,000
The Whole Child 10155 Colima Road Whittier, CA 90603			Support for needy children	3,000
United Friends of the Children 1055 Wilshire Blvd 1955 Los Angeles, CA 90017			Support for needy children	500
Univ of CO Cancer Center Foundation 13001 E 17th Place Aurora, CO 80045			Medical research	5,000
We Tell Stories 600 Marie Los Angeles, CA 90042			Arts education	5,000
Wellbody Alliance 2 Atlantic Ave 4th Floor Boston, MA 02110			Support healthy lifestyles	3,000
Westlake Womens Club PO Box 4572 Westlake Village, CA 91359			Support various local charity	750
YMCA of Silicon Valley 80 Saratoga Avenue Santa Clara, CA 95051			Support for physical fitness	5,500
Total  3a				905,511

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>				
Zachary Scott Theater Center 1426 Toomey Road Austin, TX 78704			Support for the fine arts	9,884
Philanthropy International 333 Indian Hill Blvd Claremont, CA 91711			General charity via Donor advised funds	2,454
Total  3a				905,511

TY 2014 Accounting Fees Schedule**Name:** Philanthropy International**EIN:** 87-0643877**Software ID:** 14000265**Software Version:** 2014v5.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Accounting	1,750	0	0	0

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2014 Depreciation Schedule

Name: Philanthropy International

EIN: 87-0643877

Software ID: 14000265

Software Version: 2014v5.0

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
Office Equipment	2012-07-01	2,350	1,222	200DB	19 20 %	451	226		

TY 2014 Land, Etc. Schedule

Name: Philanthropy International

EIN: 87-0643877

Software ID: 14000265

Software Version: 2014v5.0

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
Machinery and Equipment	2,350	1,673	677	

TY 2014 Legal Fees Schedule

Name: Philanthropy International

EIN: 87-0643877

Software ID: 14000265

Software Version: 2014v5.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Legal	1,348	0	0	0

TY 2014 Mortgages and Notes Payable Schedule**Name:** Philanthropy International**EIN:** 87-0643877**Software ID:** 14000265**Software Version:** 2014v5.0**Total Mortgage Amount:** 61,924

TY 2014 Other Expenses Schedule**Name:** Philanthropy International**EIN:** 87-0643877**Software ID:** 14000265**Software Version:** 2014v5.0

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Bank Charges	516			
Client & Employee Appreciation	371			
Computer and Web expense	973			
Expenses paid on behalf of DAF	54,102	54,102		
Insurance	2,490			
Leased Employee Fees	122,022	30,505		
Marketing & Promotion	34			
Meals and Entertainment	73			
Miscellaneous expense	266			
Office expense	966			
Outside Consultants	1,912			
Postage and Delivery	742			
Telecommunications	1,463			

TY 2014 Other Income Schedule

Name: Philanthropy International

EIN: 87-0643877

Software ID: 14000265

Software Version: 2014v5.0

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
Legacy Partner Charity	2,995		
Management Fees	126,068		

TY 2014 Taxes Schedule

Name: Philanthropy International

EIN: 87-0643877

Software ID: 14000265

Software Version: 2014v5.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
State franchise tax	1,925			

Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service	Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 990-PF. ▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at www.irs.gov/form990.	OMB No 1545-0047 2014
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Name of the organization Philanthropy International	Employer identification number 87-0643877
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Organization type (check one)

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

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

General Rule

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

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** \$5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year. ▶ \$ _____

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

Part I Contributors (see Instructions) Use duplicate copies of Part I if additional space is needed			
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
_____	See Additional Data Table _____ _____ _____	\$ _____	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
_____	_____ _____ _____	\$ _____	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
_____	_____ _____ _____	\$ _____	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
_____	_____ _____ _____	\$ _____	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
_____	_____ _____ _____	\$ _____	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
_____	_____ _____ _____	\$ _____	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
_____	_____ _____ _____	\$ _____	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)

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

Schedule B (Form 990, 990-EZ, or 990-PF) (2014)

Name of organization Philanthropy International	Employer identification number 87-0643877
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Part III

Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of **\$1,000 or less** for the year. (Enter this information once. See instructions.) ▶ \$ _____

Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	
_____		_____	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	
_____		_____	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	
_____		_____	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	
_____		_____	

Additional Data

Software ID: 14000265

Software Version: 2014v5.0

EIN: 87-0643877

Name: Philanthropy International

Form 990 Schedule B, Part I - Contributors (see Instructions) Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	Mitch Allen 28332 Camino Capistrano Laguna Niguel, CA 92677	\$ 22,500	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
2	Doug Marilyn Faber c/o 333 N Indian Hill Blvd Claremont, CA 91711	\$ 10,000	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
3	Tim Deborah Triplett 690 Camino Manzumas Thousand Oaks, CA 91360	\$ 60,000	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
4	Marvin Lead Trust c/o 333 N Indian Hill Blvd Claremont, CA 91711	\$ 81,342	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
5	Blank CLAT c/o 333 N Indian Hill Blvd Claremont, CA 91711	\$ 25,000	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
6	Robert Pamela Smith Investment LP 1424 17th Street Bakersfield, CA 93301	\$ 174,500	Person ☒ Payroll ☐ Noncash ☒ (Complete Part II for noncash contribution)

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
<u>7</u>	Ben Falcone Melissa McCarthy c/o 333 N Indian Hill Blvd Claremont, CA 91711	\$ <u>550,000</u>	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)