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EXTENDED TO NOVEMBER 16, 2015

## Return of Private Foundation

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

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

OMB No 1545-0052

2014

Open to Public Inspection

Form 990-PF

Department of the Treasury  
Internal Revenue Service

For calendar year 2014 or tax year beginning

, and ending

Name of foundation <b>HANS AND CLARA ZIMMERMAN FOUNDATION</b>		A Employer identification number <b>99-6006669</b>
Number and street (or P.O. box number if mail is not delivered to street address) <b>P. O. BOX 3170, DEPT 715</b>	Room/suite	B Telephone number <b>(808) 694-4393</b>
City or town, state or province, country, and ZIP or foreign postal code <b>HONOLULU, HI 96802</b>		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) <b>\$ 14,790,798.</b>	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

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))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments		116.	116.		STATEMENT 1
4 Dividends and interest from securities		366,487.	366,487.		STATEMENT 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		589,413.			
b Gross sales price for all assets on line 6a		2,886,068.			
7 Capital gain net income (from Part IV, line 2)			589,413.		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income		168,560.	168,560.		STATEMENT 3
12 Total. Add lines 1 through 11		1,124,576.	1,124,576.		
13 Compensation of officers, directors, trustees, etc.		133,726.	80,236.		53,490.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees STMT 4		2,700.	810.		1,890.
c Other professional fees					
17 Interest					
18 Taxes STMT 5		29,250.	660.		0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings		142.	0.		142.
22 Printing and publications					
23 Other expenses STMT 6		77,650.	40,950.		36,700.
24 Total operating and administrative expenses. Add lines 13 through 23		243,468.	122,656.		92,222.
25 Contributions, gifts, grants paid		638,750.			638,750.
26 Total expenses and disbursements. Add lines 24 and 25		882,218.	122,656.		730,972.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		242,358.			
b Net investment income (if negative enter -0-)			1,001,920.		
c Adjusted net income (if negative enter -0-)				N/A	

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end of year amounts only			
		Beginning of year	End of year		
		(a) Book Value	(b) Book Value	(c) Fair Market Value	
Assets	1 Cash - non-interest-bearing	8,738.	28,558.	28,558.	
	2 Savings and temporary cash investments	382,067.	179,917.	179,917.	
	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				
	7 Other notes and loans receivable ▶				
	Less: allowance for doubtful accounts ▶				
	8 Inventories for sale or use				
	9 Prepaid expenses and deferred charges				
	10a Investments - U.S. and state government obligations				
	b Investments - corporate stock				
	c Investments - corporate bonds				
	Liabilities	11 Investments - land, buildings, and equipment basis ▶			
Less: accumulated depreciation ▶					
12 Investments - mortgage loans					
13 Investments - other STMT 8		11,730,469.	12,179,569.	13,798,373.	
14 Land, buildings, and equipment: basis ▶					
Less: accumulated depreciation ▶					
15 Other assets (describe ▶ MINERAL ROYALTIES )		0.	0.	783,950.	
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		12,121,274.	12,388,044.	14,790,798.	
17 Accounts payable and accrued expenses					
18 Grants payable					
Net Assets or Fund Balances	19 Deferred revenue				
	20 Loans from officers, directors, trustees, and other disqualified persons				
	21 Mortgages and other notes payable				
	22 Other liabilities (describe ▶ )				
23 Total liabilities (add lines 17 through 22)	0.	0.			
Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>	24 Unrestricted				
	25 Temporarily restricted				
	26 Permanently restricted				
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>	27 Capital stock, trust principal, or current funds	12,121,274.	12,388,044.	
		28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
		29 Retained earnings, accumulated income, endowment, or other funds	0.	0.	
		30 Total net assets or fund balances	12,121,274.	12,388,044.	
		31 Total liabilities and net assets/fund balances	12,121,274.	12,388,044.	

## 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	12,121,274.
2 Enter amount from Part I, line 27a	2	242,358.
3 Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 7	3	25,510.
4 Add lines 1, 2, and 3	4	12,389,142.
5 Decreases not included in line 2 (itemize) ▶ RETURN OF CAPITAL	5	1,098.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	12,388,044.

**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
<b>1a PUBLICLY TRADED SECURITIES</b>	P	VARIOUS	12/31/14
<b>b PUBLICLY TRADED SECURITIES</b>	P	VARIOUS	12/31/14
<b>c CLASS ACTION LITIGATION</b>	P	VARIOUS	12/31/14
<b>d CAPITAL GAINS DIVIDENDS</b>			
<b>e</b>			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
<b>a</b> 228,617.		214,643.	13,974.
<b>b</b> 2,582,399.		2,081,962.	500,437.
<b>c</b> 186.		50.	136.
<b>d</b> 74,866.			74,866.
<b>e</b>			
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	
<b>a</b>			13,974.
<b>b</b>			500,437.
<b>c</b>			136.
<b>d</b>			74,866.
<b>e</b>			

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

589,413.

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).

If (loss), enter -0- in Part I, line 8

3

N/A

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2013	667,400.	14,121,065.	.047263
2012	661,753.	13,267,688.	.049877
2011	636,571.	13,208,365.	.048195
2010	575,331.	12,603,504.	.045648
2009	693,925.	11,514,792.	.060264

2 Total of line 1, column (d)

2

.251247

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

.050249

4 Enter the net value of noncharitable-use assets for 2014 from Part X, line 5

4

14,840,253.

5 Multiply line 4 by line 3

5

745,708.

6 Enter 1% of net investment income (1% of Part I, line 27b)

6

10,019.

7 Add lines 5 and 6

7

755,727.

8 Enter qualifying distributions from Part XII, line 4

8

730,972.

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

**Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)**

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b		1	20,038.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	20,038.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
5 <b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0-		5	20,038.
6 Credits/Payments:			
a 2014 estimated tax payments and 2013 overpayment credited to 2014	6a	23,588.	
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c	5,000.	
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	28,588.	
8 Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8		
9 <b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b>	9		
10 <b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b>	10	8,550.	
11 Enter the amount of line 10 to be: <b>Credited to 2015 estimated tax</b> <input type="checkbox"/> <b>Refunded</b> <input checked="" type="checkbox"/>	11	0.	

**Part VII-A Statements Regarding Activities**

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

N/A

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

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>N/A</u>	13	X	
14	The books are in care of ► <u>BANK OF HAWAII</u> Located at ► <u>130 MERCHANT ST., HONOLULU, HI</u> Telephone no. ► <u>808-694-4393</u> ZIP+4 ► <u>96813</u>			
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 <u>N/A</u>			
16	At any time during calendar year 2014, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114, (formerly TD F 90-22.1). If "Yes," enter the name of the foreign country ►	16	Yes	No X

**Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required**

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

	Yes	No
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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b 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 ► <input type="checkbox"/>	1b	X
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	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? If "Yes," list the years ► _____, _____, _____	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b Are there any years listed in 2a for which the foundation is <b>not</b> 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.)	N/A	2b
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► _____, _____, _____		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b 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)	N/A	3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	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?	4b	X

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**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

X

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?

N/A

☐ Yes ☐ No

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

6b

X

If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b

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

1 List all officers, directors, trustees, foundation managers and their compensation.

(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
BANK OF HAWAII P.O. BOX 3170 HONOLULU, HI 96802	TRUSTEE 1.00	133,726.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Total number of other employees paid over \$50,000

0

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3 Five highest-paid independent contractors for professional services. If none, enter "NONE."

[illegible]

0

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.

1	N/A	
2		
3		
4		

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

1	N/A	
2		
	All other program-related investments. See instructions.	
3		
Total. Add lines 1 through 3		0

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**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	13,912,123.
b	Average of monthly cash balances	1b	370,174.
c	Fair market value of all other assets	1c	783,950.
d	<b>Total</b> (add lines 1a, b, and c)	1d	15,066,247.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	15,066,247.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	225,994.
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	5	14,840,253.
6	<b>Minimum investment return.</b> Enter 5% of line 5	6	742,013.

**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	742,013.
2a	Tax on investment income for 2014 from Part VI, line 5	2a	20,038.
b	Income tax for 2014 (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	20,038.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	721,975.
4	Recoveries of amounts treated as qualifying distributions	4	10,200.
5	Add lines 3 and 4	5	732,175.
6	Deduction from distributable amount (see instructions)	6	0.
7	<b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	732,175.

**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	730,972.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	730,972.
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	5	0.
6	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	6	730,972.

**Note.** The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

**Part XIII** Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2013	(c) 2013	(d) 2014
<b>1</b> Distributable amount for 2014 from Part XI, line 7				732,175.
<b>2</b> Undistributed income, if any, as of the end of 2014				
<b>a</b> Enter amount for 2013 only			54,430.	
<b>b</b> Total for prior years:		0.		
<b>3</b> Excess distributions carryover, if any, to 2014:				
<b>a</b> From 2009				
<b>b</b> From 2010				
<b>c</b> From 2011				
<b>d</b> From 2012				
<b>e</b> From 2013				
<b>f</b> Total of lines 3a through e	0.			
<b>4</b> Qualifying distributions for 2014 from Part XII, line 4: ▶ \$ 730,972.				
<b>a</b> Applied to 2013, but not more than line 2a			54,430.	
<b>b</b> Applied to undistributed income of prior years (Election required - see instructions)		0.		
<b>c</b> Treated as distributions out of corpus (Election required - see instructions)	0.			
<b>d</b> Applied to 2014 distributable amount				676,542.
<b>e</b> Remaining amount distributed out of corpus	0.			
<b>5</b> Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	0.			
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b		0.		
<b>c</b> Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
<b>d</b> Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
<b>e</b> Undistributed income for 2013. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
<b>f</b> Undistributed income for 2014. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2015				55,633.
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
<b>8</b> Excess distributions carryover from 2009 not applied on line 5 or line 7	0.			
<b>9</b> Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a	0.			
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2010				
<b>b</b> Excess from 2011				
<b>c</b> Excess from 2012				
<b>d</b> Excess from 2013				
<b>e</b> Excess from 2014				

<b>Part XIV</b>	<b>Private Operating Foundations</b> (see instructions and Part VII-A, question 9)
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N/A

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

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







## FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
DREYFUS CASH MANAGEMENT - INST	116.	116.	
TOTAL TO PART I, LINE 3	116.	116.	

## FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
BOH #115026502	441,353.	74,866.	366,487.	366,487.	
TO PART I, LINE 4	441,353.	74,866.	366,487.	366,487.	

## FORM 990-PF OTHER INCOME STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
BANK OF AMERICA - NET MINERAL ROYALTY INCOME	168,560.	168,560.	
TOTAL TO FORM 990-PF, PART I, LINE 11	168,560.	168,560.	

## FORM 990-PF ACCOUNTING FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TAX PREPARATION FEES	2,700.	810.		1,890.
TO FORM 990-PF, PG 1, LN 16B	2,700.	810.		1,890.

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FORM 990-PF	TAXES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES PAID	660.	660.		0.
EXTENSION PAYMENT FOR FYE 12/31/2013	14,590.	0.		0.
2ND QTR FEDERAL EXCISE TAX PAYMENT FOR FYE 12/31/14	3,000.	0.		0.
3RD QTR FEDERAL EXCISE TAX PAYMENT FOR FYE 12/31/14	8,000.	0.		0.
4TH QTR FEDERAL EXCISE TAX PAYMENT FOR FYE 12/31/14	3,000.	0.		0.
TO FORM 990-PF, PG 1, LN 18	29,250.	660.		0.

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FORM 990-PF	OTHER EXPENSES	STATEMENT	6
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
MINERAL ROYALTY EXPENSES	40,819.	40,819.		0.
SCHOLARSHIP COMMITTEE FEES	5,000.	0.		5,000.
GRANTS ADMINISTRATION	31,700.	0.		31,700.
INVESTMENT FEE	131.	131.		0.
TO FORM 990-PF, PG 1, LN 23	77,650.	40,950.		36,700.

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FORM 990-PF	OTHER INCREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	7
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DESCRIPTION	AMOUNT
PRIOR YEAR GRANTS RETURNED	10,200.
MINERAL ROYALTY ADJUSTMENTS	15,310.
TOTAL TO FORM 990-PF, PART III, LINE 3	25,510.



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FORM 990-PF	OTHER INVESTMENTS	STATEMENT	8
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
SEE STATEMENT-INV	COST	12,179,569.	13,798,373.
TOTAL TO FORM 990-PF, PART II, LINE 13		12,179,569.	13,798,373.

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## Dr. Hans & Clara D. Zimmerman Foundation

For paid payments 1/1/2014 to 12/31/2014

Payee Name	Purpose	Payment Amount
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### A T Still University of Health Sciences

5850 E Still Circle  
Mesa, AZ 85206

Baird, Kanoelehua	Scholarship	\$5,000 00
Iyo, Jennifer	Scholarship	\$3,500 00
Vu, Vy Vy	Scholarship	\$4,750 00
Yamamoto, Adrienne	Scholarship	\$3,500 00
Yong, Tasha-Leigh	Scholarship	\$2,200 00

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Subtotal for A T Still University of Health Sciences	\$18,950 00
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### Azusa Pacific University

P O Box 7000  
Azusa, CA 91702-7000

Ross, Hannah	Scholarship	\$1,700 00
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Subtotal for Azusa Pacific University	\$1,700 00
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### Baylor University

500 Speight Ave.  
Waco, TX 76798

Olaso, Danae	Scholarship	\$2,600 00
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Subtotal for Baylor University	\$2,600 00
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### Biola University

13800 Biola Ave  
La Mirada, CA 90639-0001

Sonson, Michael	Scholarship	\$1,750 00
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Subtotal for Biola University	\$1,750 00
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### Boise State University

Admin Bldg, Room 113 1910 University Drive  
Boise, ID 83725

## Dr. Hans & Clara D. Zimmerman Foundation

Kometani, Kurtis	Scholarship	\$1,700 00
Subtotal for Boise State University.		\$1,700 00

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**Boston University**  
 881 Commonwealth Avenue  
 Boston, MA 2215

Kong, Ashley	Scholarship	\$5,000 00
Lee, Vonne	Scholarship	\$4,500 00
Subtotal for Boston University.		\$9,500 00

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**Brigham Young University - Utah**  
 BYU Financial Aid, A-41 ASB  
 Provo, UT 84602

Ho Ching, Kira	Scholarship	\$1,000 00
Subtotal for Brigham Young University - Utah		\$1,000 00

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**California State University - East Bay**  
 25800 Carlos Bee Blvd  
 Hayward, CA 94542

Luu, Kevin	Scholarship	\$2,300 00
Subtotal for California State University - East Bay		\$2,300 00

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**California State University - Fullerton**  
 Office of Financial Aid  
 Fullerton, CA 92834-6804

Cardenas, Carolynn	Scholarship	\$3,500 00
Subtotal for California State University - Fullerton		\$3,500 00

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**Chaminade University of Honolulu**  
 3140 Waiālae Avenue  
 Honolulu, HI 96816-1578

Chai, Christie Ann	Scholarship	\$2,550 00
Chang, Kammy	Scholarship	\$5,000 00
Ching, Rina	Scholarship	\$2,300 00

## Dr. Hans & Clara D. Zimmerman Foundation

Chun, Sokha	Scholarship	\$4,400 00
Dela Cruz, Brandy	Scholarship	\$4,350 00
Domingo, Remmalyn	Scholarship	\$3,900 00
Haltom, Laura	Scholarship	\$3,875 00
Pokipala, Lauren	Scholarship	\$5,000 00
Ramos, Reisel Ann	Scholarship	\$2,300 00
Steverson, Kayla	Scholarship	\$2,300 00
Zulueta, Jamelani	Scholarship	\$2,300 00

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Subtotal for Chaminade University of Honolulu	\$38,275 00
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### Chapman University

Attn: Financial Aid Office, One University Drive  
Orange, CA 92866

De Ruiter, Jessica Jo	Scholarship	\$3,400 00
Dehnavi, Spencer	Scholarship	\$3,300 00
Magpoc, Arielle Marie	Scholarship	\$2,400 00
Yoshikane, Rick	Scholarship	\$3,300 00

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Subtotal for Chapman University	\$12,400 00
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### Colorado State University - Pueblo

Financial Aid Office  
Pueblo, CO 81001-4901

Micua, Mary Hope	Scholarship	\$2,100 00
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Subtotal for Colorado State University - Pueblo	\$2,100 00
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### Concordia University - Portland

Financial Aid Office  
Portland, OR 97211

Abanto, Lisa Marie	Scholarship	\$2,000 00
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Subtotal for Concordia University - Portland	\$2,000 00
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### Creighton University

Office of Financial Aid  
Omaha, NE 68178

Kawamura, Kendra	Scholarship	\$3,500 00
Lin, Yueshi	Scholarship	\$3,500 00

## Dr. Hans & Clara D. Zimmerman Foundation

Ngo, Andi	Scholarship	\$3,500 00
Patricio, Teariana	Scholarship	\$2,500 00
Ramos, Tiffany	Scholarship	\$3,500 00
Yonamine, Kayla	Scholarship	\$2,300 00

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Subtotal for Creighton University.	\$18,800 00
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### Dominican University of California

Attn. Tuition and Financial Aid  
San Rafael, CA 94901-2298

Long, Nicole	Scholarship	\$3,300 00
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Subtotal for Dominican University of California	\$3,300 00
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### Duke University

Office of Undergraduate Financial Aid  
Durham, NC 27708

Higa-Howerton, Allison	Scholarship	\$2,500 00
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Subtotal for Duke University.	\$2,500 00
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### Eastern Washington University

Financial Aid and Scholarships  
Cheney, WA 99004

Shinsato, Stephanie	Scholarship	\$1,750 00
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Subtotal for Eastern Washington University.	\$1,750 00
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### Harvard University

953 Holyoke Center, 1350 Massachusetts Avenue  
Cambridge, MA 02138

Nakatsuka, Nathan	Scholarship	\$3,300 00
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Subtotal for Harvard University	\$3,300 00
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### Hawaii Pacific University

1164 Bishop Street, Suite 800  
Honolulu, HI 96813

Baltazar It, Rogelio	Scholarship	\$2,300 00
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## Dr. Hans & Clara D. Zimmerman Foundation

Batul, Joanna Di	Scholarship	\$1,000 00
Bayudan, Kelly Ann	Scholarship	\$1,800 00
D'Amico, Esther	Scholarship	\$2,100 00
Jensen, Jacqueline	Scholarship	\$5,000 00
Kaimimoku-Wong, Christen	Scholarship	\$1,000 00
Melendres, Chasity	Scholarship	\$1,100 00
Nagal, Mhelicent	Scholarship	\$2,100 00
Niheu, Kala'iokamalino	Scholarship	\$2,300 00
Okazaki, Megumi	Scholarship	\$2,300 00
Olegario, Rayleen	Scholarship	\$1,300 00
Patterson, Joanna	Scholarship	\$1,900 00
Pelaez, Ferd Nicko	Scholarship	\$1,000 00
Pescadero, Michelle	Scholarship	\$1,100 00
Rivera, Jasmine Grace	Scholarship	\$2,300 00
Ugay, Renalyn	Scholarship	\$1,000 00

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Subtotal for Hawaii Pacific University	\$29,600 00
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### Idaho State University

Attn: Financial Aid Office  
Pocatello, ID 83209

Olivera, Christine	Scholarship	\$3,500 00
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Subtotal for Idaho State University	\$3,500 00
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### Indiana University - Purdue University - Indianapolis

Office of Student Financial Services  
Indianapolis, IN 46202-5145

Sing-Pedro, Christina	Scholarship	\$5,000 00
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Subtotal for Indiana University - Purdue University - Indianapolis	\$5,000 00
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### Loma Linda University

11139 Anderson St.  
Loma Linda, CA 92350

Agag, Carrie-Ann	Scholarship	\$3,500 00
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Subtotal for Loma Linda University	\$3,500 00
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### Loyola Marymount University

1 LMU Drive Suite 200

## Dr. Hans & Clara D. Zimmerman Foundation

Los Angeles, CA 90045-2659

Alves, Shaina	Scholarship	\$2,300 00
Lawrence, Karina	Scholarship	\$2,400 00

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Subtotal for Loyola Marymount University:	\$4,700 00
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### Loyola University Chicago

1032 W Sheridan Rd  
Chicago, IL 60660

Tanaka, Steffanie	Scholarship	\$1,000 00
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Subtotal for Loyola University Chicago.	\$1,000 00
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### Manhattanville College

2900 Purchase St  
Purchase, NY 10577

Caoili, Charlene Mae	Scholarship	\$2,500 00
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Subtotal for Manhattanville College	\$2,500 00
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### Marymount College - Rancho Palos Verdes

30800 Palos Verdes Drive East  
Rancho Palos Verdes, CA 90275-6299

Timbobolan, Jasah	Scholarship	\$2,650 00
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Subtotal for Marymount College - Rancho Palos Verdes	\$2,650 00
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### Midland Lutheran College

900 N Clarkson  
Fremont, NE 68025

Luning-Hoshino, Jacob	Scholarship	\$2,550 00
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Subtotal for Midland Lutheran College	\$2,550 00
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### Mount Saint Mary's College

12001 Chalon Rd  
Los Angeles, CA 90049-1599

Martin, Brianna Jizelle	Scholarship	\$3,200 00
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STATEMENT - GRA

## Dr. Hans & Clara D. Zimmerman Foundation

Subtotal for Mount Saint Mary's College		\$3,200 00
<hr/>		
<b>National College of Natural Medicine</b>		
Financial Aid Office		
Portland, OR 97201		
Becker-Brungard, Heather	Scholarship	\$3,500 00
Subtotal for National College of Natural Medicine		\$3,500 00
<hr/>		
<b>Northwestern University</b>		
1801 Hinman Avenue		
Evanston, IL 60208		
Lum, Ross	Scholarship	\$3,500 00
Sakumoto, Matthew	Scholarship	\$5,000 00
Subtotal for Northwestern University		\$8,500 00
<hr/>		
<b>Notre Dame de Namur University</b>		
Financial Aid Office		
Belmont, CA 94002		
Koki, Cheyenne	Scholarship	\$1,000 00
Subtotal for Notre Dame de Namur University		\$1,000 00
<hr/>		
<b>Occidental College</b>		
1600 Campus Rd		
Los Angeles, CA 90041-3392		
Spenser, Ari	Scholarship	\$3,300 00
Subtotal for Occidental College		\$3,300 00
<hr/>		
<b>Ohio State University</b>		
Student Financial Aid Office, PO Box 183029		
Columbus, OH 43218-3029		
Nozaki, Steven	Scholarship	\$2,550 00
Subtotal for Ohio State University		\$2,550 00
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## Dr. Hans & Clara D. Zimmerman Foundation

### Oregon State University

218 Kerr Administration Building  
Corvallis, OR 97331

Kaikaka, Jennifer	Scholarship	\$2,000 00
Louis-Soares, Brittney	Scholarship	\$3,500.00
Matsui, Lahela	Scholarship	\$3,500 00
Subtotal for Oregon State University.		\$9,000 00

### Pacific Lutheran University

1010 122nd St So  
Tacoma, WA 98447-0003

Sibayan, Sharmaine	Scholarship	\$3,000 00
Subtotal for Pacific Lutheran University		\$3,000 00

### Pacific University

2043 College Way  
Forest Grove, OR 97116

Abe, Kellie	Scholarship	\$3,400 00
Baldonado, Chance Whitnie	Scholarship	\$2,500 00
Davidson, Kayla	Scholarship	\$2,550 00
Guieb, Ashley	Scholarship	\$3,500 00
Kawamoto, Kellie	Scholarship	\$3,500 00
Kim, Darran	Scholarship	\$3,250 00
Kinilau, Shawna	Scholarship	\$3,500 00
Lum Ho, Dane	Scholarship	\$2,550 00
Maldonado, Chanelle	Scholarship	\$1,900 00
Membrere, Tere Ann	Scholarship	\$3,000 00
Turbeville, Louis	Scholarship	\$3,500 00
Yamamoto, Stephanie	Scholarship	\$3,500 00
Yoshida, Ann	Scholarship	\$3,500 00
Subtotal for Pacific University		\$40,150 00

### Penn State University - University Park

Attn Outside Scholarships  
University Park, PA 16802

Tupinio, Maegan	Scholarship	\$2,100 00
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## Dr. Hans & Clara O. Zimmerman Foundation

Subtotal for Penn State University - University Park		\$2,100 00
<hr/>		
<b>Regis University</b>		
3333 Regis Blvd A-8		
Denver, CO 80221-1099		
Lehano, Cory	Scholarship	\$3,500 00
Tanabe, Aleina	Scholarship	\$2,900 00
Subtotal for Regis University		\$6,400 00
<hr/>		
<b>Rush University</b>		
The Office of Student Financial Aid, 600 South Pau		
Chicago, IL 60612		
Arca, Chris	Scholarship	\$5,000 00
Subtotal for Rush University		\$5,000 00
<hr/>		
<b>Rutgers University - New Brunswick</b>		
Attn Office of Financial Aid		
New Brunswick, NJ 08901-1175		
Hu, Kenneth	Scholarship	\$1,000 00
Subtotal for Rutgers University - New Brunswick		\$1,000 00
<hr/>		
<b>Seattle University</b>		
900 Broadway		
Seattle, WA 98122-4340		
Kawano, Austin	Scholarship	\$2,600 00
Subtotal for Seattle University		\$2,600 00
<hr/>		
<b>Southern California College of Optometry</b>		
2575 Yorba Linda Blvd		
Fullerton, CA 92831-1699		
Ida, Jessica	Scholarship	\$3,500 00
Luke, Ashley	Scholarship	\$3,500 00
Subtotal for Southern California College of Optometry		\$7,000 00
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## Dr. Hans & Clara D. Zimmerman Foundation

### University of California - Berkeley

201 Sprout Hall #1960

Berkeley, CA 94720

Keolanui, Beth	Scholarship	\$1,800 00
Subtotal for University of California - Berkeley:		\$1,800 00

### University of California - Irvine

Office of Financial Aid & Scholarships

Irvine, CA 92697-2825

Deville, Nicole	Scholarship	\$3,400 00
Subtotal for University of California - Irvine.		\$3,400 00

### University of Colorado - Colorado Springs

1420 Austin Bluffs Parkway

Colorado Springs, CO 80918

Pang, Hanna	Scholarship	\$3,400 00
Subtotal for University of Colorado - Colorado Springs.		\$3,400 00

### University of Colorado - Denver

Bursar's Office

Aurora, CO 80045

Hall, Heidi	Scholarship	\$3,500 00
Subtotal for University of Colorado - Denver		\$3,500 00

### University of Hawaii - Hilo

Financial Aid Office, 200 W Kawili St

Hilo, HI 96720-4091

Calibuso, Marites	Scholarship	\$2,300 00
Cayetano, Robby-Sean	Scholarship	\$1,100 00
Chen, Matt	Scholarship	\$2,800 00
Cooper, Shawna	Scholarship	\$3,500 00
Delenia, RonniJean	Scholarship	\$2,800 00
Dellinger, Randy	Scholarship	\$3,300 00
Diaz, Christopher	Scholarship	\$2,800 00
Fujii, Shaylyn	Scholarship	\$1,200 00

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STATEMENT - GRA

## Dr. Hans & Clara D. Zimmerman Foundation

Gabriel, Jozelle	Scholarship	\$2,800 00
Girmay, Sisay	Scholarship	\$2,800 00
Glasgow, Micah	Scholarship	\$2,700 00
Guan, Heidi	Scholarship	\$1,000 00
Hagiwara, Kehau	Scholarship	\$1,000 00
Hanabaga, Samantha	Scholarship	\$2,750 00
Hanai, Davis	Scholarship	\$2,750 00
Hoff, Tobl	Scholarship	\$3,450 00
Kaapana-Suzui, Namanu	Scholarship	\$2,550 00
Kocharov, Evelina	Scholarship	\$3,500 00
Lazickas, Valerie	Scholarship	\$1,400 00
Love, Christina	Scholarship	\$2,550 00
Machacek, Alayna	Scholarship	\$1,400 00
Mata, Carle-Ann	Scholarship	\$1,300 00
Mogote, Norman	Scholarship	\$1,400 00
Monette, Melissa	Scholarship	\$2,800 00
Ng, Tracy	Scholarship	\$2,800 00
Puli, Mailani	Scholarship	\$1,400 00
Savainaea, Teri	Scholarship	\$1,200 00
Schaupp, Annie	Scholarship	\$1,250 00
Thai, Christopher	Scholarship	\$2,800 00
Tsuji, Eric	Scholarship	\$2,800 00
Tsutsumi, Lissa	Scholarship	\$2,500 00
Waipa, Tianna	Scholarship	\$3,500 00
Yadav, Nalini	Scholarship	\$3,800 00

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Subtotal for University of Hawaii - Hilo \$78,000 00

### University of Hawaii - Manoa

2440 Campus Rd , Box 447  
Honolulu, HI 96822

Agor, Jamie-Lyn	Scholarship	\$1,300 00
Akagi, Sharisse	Scholarship	\$850 00
Akana, Alexandres-Joan	Scholarship	\$2,550 00
Aki, Kiley	Scholarship	\$1,000 00
Akim, Carm Celine	Scholarship	\$2,000 00
Antonio, Mapuana	Scholarship	\$1,600 00
Apao, Kami	Scholarship	\$1,275 00
Balala, Rocky	Scholarship	\$1,100 00
Ben, Kimberly Jean	Scholarship	\$1,000 00
Boehm, Laura	Scholarship	\$1,600 00
Bonilla, Cherry May	Scholarship	\$1,400 00
Bryant, Kainoa	Scholarship	\$1,700 00

## Dr. Hans & Clara D. Zimmerman Foundation

Caouette, Cheyenne	Scholarship	\$1,000 00
Castel, Nikki	Scholarship	\$3,000 00
Chu, Allison	Scholarship	\$1,000 00
Chun, Alyssa	Scholarship	\$3,000 00
Chun, Shay	Scholarship	\$1,000 00
Davis, Chevelle	Scholarship	\$1,400 00
Diep, Vinson	Scholarship	\$3,000 00
Doi, Maegan	Scholarship	\$3,000 00
Du, Weiming	Scholarship	\$1,700 00
Fox, Kacie	Scholarship	\$3,000 00
Gaughen, Kapono	Scholarship	\$1,000 00
Giancaterino, Shaun	Scholarship	\$3,000 00
Gilman, Christy Ann	Scholarship	\$3,000 00
Gollero, Jolana	Scholarship	\$3,000 00
Goo, Alana	Scholarship	\$1,200 00
Hee, Puanani	Scholarship	\$1,400 00
Hirai, Kelsi	Scholarship	\$3,000 00
Hitosugi-Levesque, Marina	Scholarship	\$3,000 00
Hu, Lauren	Scholarship	\$3,000 00
Jacintho, Brooke	Scholarship	\$1,200 00
Johnson, Scarlett	Scholarship	\$2,900 00
Kahlbaum, Fallan	Scholarship	\$1,700 00
Kamai, Keani	Scholarship	\$1,600 00
Kandler, Courtney	Scholarship	\$2,300 00
Kanemori, Michele	Scholarship	\$3,000 00
Kiaha, Mandy	Scholarship	\$1,600 00
Koehler, Malie	Scholarship	\$2,550 00
Lam, Crystal	Scholarship	\$3,000 00
Lee, Christine	Scholarship	\$3,000 00
Lee, Darsha	Scholarship	\$1,700 00
Lee, Devin	Scholarship	\$3,000 00
Lee, Mark	Scholarship	\$1,700 00
Lin, Vivian	Scholarship	\$3,000 00
Lizama, Kamala	Scholarship	\$1,200 00
Lum, Jennifer	Scholarship	\$1,000 00
Lyu, Justin	Scholarship	\$2,100 00
Makua, Raymond	Scholarship	\$2,500 00
Mateo, Desiree Joi	Scholarship	\$1,000 00
Maunakea, Summer	Scholarship	\$5,000 00
McCloughlin, Jaclyn	Scholarship	\$3,000 00
Miyasato, Nicholas	Scholarship	\$1,700 00
Morisako, Ashley	Scholarship	\$3,000 00
Nakamatsu, Jennifer	Scholarship	\$3,000 00
Nakatsuka, Austin	Scholarship	\$3,000 00
Naleieha, Billie Jo	Scholarship	\$2,550 00

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STATEMENT - GRA

## Dr. Hans & Clara D. Zimmerman Foundation

Namnama, Premar	Scholarship	\$1,000 00
Ng, Quinn	Scholarship	\$2,800 00
Niles, Jessica	Scholarship	\$1,100 00
Noel, Erika	Scholarship	\$3,000 00
Otsuji, Janelle	Scholarship	\$3,000 00
Padeken, Kanoelani	Scholarship	\$2,550 00
Pagaduan, Dara	Scholarship	\$1,700 00
Parcels, Kellie	Scholarship	\$2,550 00
Pascual, Ashley	Scholarship	\$1,000 00
Peebles, Charles	Scholarship	\$1,700 00
Pham, Valynn	Scholarship	\$3,000 00
Purdy, Chanley	Scholarship	\$1,600 00
Quiocho, Ann Jillian	Scholarship	\$1,200 00
Rivera, Michelle	Scholarship	\$1,700 00
Rosehill, Haley	Scholarship	\$1,700 00
Ruth, Chelsey	Scholarship	\$3,000 00
Sanchez, Luzielynn	Scholarship	\$1,700 00
Silva, Kanakalele	Scholarship	\$1,000 00
Souza, Megan	Scholarship	\$1,000 00
Stoltzman, Elizabeth	Scholarship	\$1,700 00
Stout, Chelsey	Scholarship	\$3,300 00
Tagorda, Michelle	Scholarship	\$1,300 00
Takahashi, Ken	Scholarship	\$1,100 00
Tamura, Aileen	Scholarship	\$3,000 00
Tom, Elysse	Scholarship	\$3,000 00
Vendiola, Joanna	Scholarship	\$1,000 00
Vieira, Vera	Scholarship	\$1,600 00
Wang, Erica	Scholarship	\$3,000 00
Wong, Dayton	Scholarship	\$3,000 00
Wong, Jennifer	Scholarship	\$2,500 00
Wong, Yee Wing	Scholarship	\$3,400 00
Yang, Yeu-Tyng	Scholarship	\$1,700 00
Yuen, Jessica	Scholarship	\$3,000 00
Yuen, Melorie	Scholarship	\$1,400 00

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Subtotal for University of Hawaii - Manoa      \$191,675 00

### University of Hawaii - West Oahu

Financial Aid Office,  
Kapolei, HI 96707

Arasato, Nolan	Scholarship	\$2,550 00
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Subtotal for University of Hawaii - West Oahu      \$2,550 00

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**STATEMENT - GRA**

## Dr. Hans & Clara D. Zimmerman Foundation

### University of Illinois - Urbana-Champaign

601 E John Street  
Champaign, IL 61820-5711

Wong, Chelsea	Scholarship	\$3,250 00
Subtotal for University of Illinois - Urbana-Champaign		\$3,250 00

### University of Iowa

Attn: Office of Student Financial Aid  
Iowa City, IA 52242-1315

Doo, Taisha	Scholarship	\$3,000 00
Subtotal for University of Iowa		\$3,000 00

### University of Missouri - Kansas City

5100 Rockhill Rd  
Kansas City, MO 64110

Tada, Kendall	Scholarship	\$4,750 00
Subtotal for University of Missouri - Kansas City		\$4,750 00

### University of Nevada - Las Vegas

Box 452016  
Las Vegas, NV 89154

Prothero, Brayden	Scholarship	\$1,000 00
Tsutahara, Celeste	Scholarship	\$2,100 00
Villamor, Chelsea	Scholarship	\$1,400 00
Subtotal for University of Nevada - Las Vegas		\$4,500 00

### University of Nevada - Reno

Fitzgerald Student Svcs Bldg, 319  
Reno, NV 89557-0076

Arcega, Jennifer	Scholarship	\$1,300 00
Subtotal for University of Nevada - Reno		\$1,300 00

### University of Oregon

## Dr. Hans & Clara D. Zimmerman Foundation

Attn: Cashiers  
Eugene, OR 97403

Shiroma, Sarah	Scholarship	\$2,550 00
Subtotal for University of Oregon.		\$2,550 00

**University of Pennsylvania**  
Outside Scholarship Office  
Philadelphia, PA 19104-6270

Oishi, Matthew	Scholarship	\$4,650 00
Subtotal for University of Pennsylvania		\$4,650 00

**University of Portland**  
5000 N Willamette Blvd  
Portland, OR 97203-5798

Chung, Kianni	Scholarship	\$1,400 00
Young, Skye	Scholarship	\$2,200 00
Subtotal for University of Portland		\$3,600 00

**University of Puget Sound**  
1500 N Warner St., #1075  
Tacoma, WA 98416-1075

Ehara, Janelle	Scholarship	\$3,000 00
Subtotal for University of Puget Sound		\$3,000 00

**University of San Francisco**  
Financial Aid Office  
San Francisco, CA 94117-1080

Ishida, Anessa	Scholarship	\$3,000 00
Nguyen, Vivica	Scholarship	\$3,800 00
Yang, Jayne	Scholarship	\$2,300 00
Subtotal for University of San Francisco		\$9,100 00

**University of Southern California**  
USC Financial Aid Office



## Dr. Hans & Clara D. Zimmerman Foundation

Los Angeles, CA 90089

Bright, Aaron	Scholarship	\$3,400 00
Kwock, Maggie	Scholarship	\$4,000 00
Takayesu, Jamie	Scholarship	\$1,700 00
Subtotal for University of Southern California		\$9,100 00

**University of Texas - Dallas**  
Office of Financial Aid, ROC 22  
Richardson, TX 75080-3021

Wade, Alyssa	Scholarship	\$2,700 00
Subtotal for University of Texas - Dallas		\$2,700 00

**University of the Pacific**  
3601 Pacific Ave  
Stockton, CA 95211-0197

Kamigaki, Corrie	Scholarship	\$3,500 00
Subtotal for University of the Pacific		\$3,500 00

**University of Washington**  
Scholarships  
Seattle, WA 98124-1967

Koga, Trisha	Scholarship	\$1,700 00
Shontell, Kelly	Scholarship	\$5,000 00
Yim, Gibbs	Scholarship	\$5,000 00
Subtotal for University of Washington		\$11,700 00

**Vanderbilt University**  
Attn: Office of Student Financial Aid and Undergr  
Nashville, TN 37203-1725

Gomez, Josie	Scholarship	\$3,500 00
Subtotal for Vanderbilt University		\$3,500 00

**Washington State University**  
Receivables Office

## Dr. Hans & Clara D. Zimmerman Foundation

Pullman, WA 99164-1039

Valencia, Dominique

Scholarship \$3,500 00

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Subtotal for Washington State University. \$3,500 00

Total for Fund. \$638,750 00

# TOKYU FOUNDATION 2014 GRANTS

<i>Payee</i>	<i>Purpose</i>	<i>Amount</i>
Polynesia Voyaging Society 10 Sand Island Parkway Honolulu, HI 96819	In Memory of Foundation Director, KENNETH F. BROWN, and in support of <i>The Hokule'a "Malama Honua" Worldwide Voyage.</i>	\$ 5,000.00
Friends of the Future 64-1032 Mamalahoa Hwy Waimea, HII 96743	In Memory of Foundation Director, KENNETH F. BROWN, and in support of Tutu's House	\$ 4,000.00
The Nature Conservancy 923 Nuuanu Avenue Honolulu, HI 96817	Support for West Hawaii invasive fish removal project on Hawaii Island	\$ 3,000.00
	<b>Total</b>	<b><u>\$ 12,000.00</u></b>

**HANS AND CLARA ZIMMERMAN FOUNDATION**  
**2014 FORM 990-PF**  
**PART II, INVESTMENTS - OTHER**  
**EIN: 99-6006669**

Description	Units	Book Value	Market Value
780259107 ROYAL DUTCH SHELL PLC ADR B	665.000	42,367.35	46,257.00
78462F103 SPDR S&P 500 ETF TRUST	4395.000	703,102.00	903,348.00
80004C101 SANDISK CORP	120.000	6,930.55	11,758.00
806857108 SCHLUMBERGER LTD	230.000	15,578.57	19,644.00
81721M109 SENIOR HOUSING PROP TRUST	760.000	18,260.31	16,804.00
842587107 SOUTHERN CO	955.000	37,897.84	46,900.00
858912108 STERICYCLE INC	300.000	23,301.95	39,324.00
880208400 TEMPLETON GLOBAL BOND FUND CL AD	13205.197	177,969.29	163,876.00
884116401 THIRD AVENUE REAL ESTATE VALUE FUND CL IS	11675.596	262,467.39	367,431.00
88732J207 TIME WARNER CABLE INC	115.000	6,786.03	17,487.00
89151E109 TOTAL SA SP ADR	905.000	42,894.06	46,336.00
902973304 US BANCORP	265.000	5,736.19	11,912.00
904767704 UNILEVER PLC SPONSORED ADR	550.000	20,722.32	22,264.00
913017109 UNITED TECHNOLOGIES CORP	135.000	9,762.92	15,525.00
921909818 VANGUARD TOTAL INTL ST INDEX FUND-ADM	23244.816	634,388.56	604,365.00
921937603 VANGUARD TOTAL BOND MARKET INDEX FUND ADM	45299.865	480,553.80	492,410.00
921937835 VANGUARD TOTAL BOND MARKET ETF	10498.000	889,602.78	864,720.00
92220P105 VARIAN MEDICAL SYSTEMS INC	335.000	18,722.56	28,981.00
92276F100 VENTAS INC	395.000	25,827.99	28,322.00
922908728 VANGUARD TOTL STK MKT IND-AD	41785.190	1,906,453.73	2,156,116.00
92343V104 VERIZON COMMUNICATIONS	1045.000	37,965.98	48,885.00
92345Y106 VERISK ANALYTICS INC CL A	445.000	16,169.72	28,502.00
92826C839 VISA INC CL A SHARES	105.000	9,294.72	27,531.00
92857W308 VODAFONE GROUP PLC SP ADR	766.000	36,954.61	26,174.00
931142103 WAL-MART STORES INC	230.000	12,408.53	19,752.00
949746101 WELLS FARGO COMPANY	630.000	17,078.48	34,537.00
969457100 WILLIAMS COMPANIES INC	735.000	28,542.68	33,031.00
G0083B108 ACTAVIS PLC	75.000	11,264.85	19,306.00
G97822103 PERRIGO COMPANY PLC	190.000	29,577.30	31,760.00
<b>Investments Other</b>		<b>12,179,568.69</b>	<b>13,798,373.00</b>

**HANS AND CLARA ZIMMERMAN FOUNDATION**  
**2014 FORM 990-PF**  
**PART II, INVESTMENTS - OTHER**  
**EIN: 99-6006669**

Description	Units	Book Value	Market Value
00206R102 AT&T INC	1580.000	45,105.51	53,072.00
002824100 ABBOTT LABORATORIES	295.000	11,439.22	13,281.00
003019395 ABERDEEN INTERNATIONAL EQUITY FUND INST	39658.296	377,303.11	569,097.00
003021698 ABERDEEN ASIA-PACIFIC EX-JAPAN EQUITY FUND INSTITUTIONAL CLASS	42777.957	353,213.13	485,958.00
00846U101 AGILENT TECHNOLOGIES INC	200.000	5,462.74	8,188.00
020002101 ALLSTATE CORP	220.000	6,930.39	15,455.00
02209S103 ALTRIA GROUP INC	1380.000	32,761.81	67,993.00
025537101 AMERICAN ELECTRIC POWER CO	260.000	10,319.58	15,787.00
025816109 AMERICAN EXPRESS CO	110.000	4,923.78	10,234.00
026874784 AMERICAN INTL GROUP	305.000	14,710.15	17,083.00
03073E105 AMERISOURCEBERGEN CORP	365.000	10,993.72	32,908.00
037411105 APACHE CORP	150.000	14,708.61	9,401.00
037833100 APPLE INC	826.000	37,690.28	91,174.00
05534B760 BCE INC	395.000	15,967.98	18,115.00
055622104 BP PLC SPONS ADR	995.000	40,951.93	37,929.00
064058100 BANK OF NEW YORK MELLON CORP	365.000	9,389.51	14,808.00
071813109 BAXTER INTL INC	220.000	10,564.48	16,124.00
084670702 BERKSHIRE HATHAWAY INC CL B	535.000	50,671.41	80,330.00
099724106 BORGWARNER INC	230.000	8,677.27	12,639.00
110122108 BRISTOL MYERS SQUIBB CO	250.000	7,050.95	14,758.00
124857202 CBS CORPORATION CL B	215.000	11,321.75	11,898.00
13057Q107 CALIFORNIA RESOURCES CORP	64.000	492.34	353.00
166764100 CHEVRON CORP	320.000	26,937.04	35,898.00
17275R102 CISCO SYSTEMS	470.000	10,302.00	13,073.00
189754104 COACH INC	1060.000	47,296.00	39,814.00
191216100 COCA COLA CO	300.000	9,636.91	12,666.00
192446102 COGNIZANT TECH SOLUTIONS CORP	860.000	25,833.80	45,288.00
197199631 COLUMBIA ACORN INTERNATIONAL CL R5	6705.820	273,445.54	279,700.00
20825C104 CONOCOPHILLIPS	1005.000	45,278.53	69,405.00
231021106 CUMMINS ENGINE INC	150.000	14,334.11	21,626.00
244199105 DEERE & CO	135.000	11,401.65	11,943.00
254709108 DISCOVER FINANCIAL SERVICES	365.000	20,709.77	23,904.00
25490A309 DIRECTV	170.000	14,667.60	14,739.00
25746U109 DOMINION RESOURCES INC /VA	425.000	20,002.76	32,683.00
260003108 DOVER CORP	210.000	8,553.58	15,061.00
26441C204 DUKE ENERGY CORP	621.000	34,689.05	51,878.00
268648102 EMC CORP	2160.000	48,159.89	64,238.00
278642103 EBAY INC	135.000	7,150.95	7,576.00
30219G108 EXPRESS SCRIPTS HOLDING CO	875.000	40,081.53	74,086.00
31428Q101 FEDERATED TOTAL RETURN BOND FUND	94311.359	1,046,513.45	1,041,197.00
35671D857 FREEPORT MCMORAN COPPER & GOLD CLASS B	390.000	15,097.19	9,110.00
369604103 GENERAL ELECTRIC CO	1110.000	18,199.56	28,050.00
37733W105 GLAXOSMITHKLINE PLC ADR	975.000	42,993.94	41,672.00
38141G104 GOLDMAN SACHS GROUP INC	70.000	8,351.30	13,568.00
38259P508 GOOGLE INC CL A	26.000	6,853.16	13,797.00

STATEMENT - INV

**HANS AND CLARA ZIMMERMAN FOUNDATION**  
**2014 FORM 990-PF**  
**PART II, INVESTMENTS - OTHER**  
**EIN: 99-6006669**

Description	Units	Book Value	Market Value
38259P706 GOOGLE INC CL C	26.000	6,835.94	13,686.00
40414L109 HCP INC	670.000	26,329.88	29,500.00
406216101 HALLIBURTON CO	260.000	8,804.14	10,226.00
40650V100 HALYARD HEALTH INC.	37.000	821.34	1,682.00
411511306 HARBOR INTL FD	8866.331	646,501.27	574,361.00
42217K106 HEALTH CARE REIT INC	375.000	16,413.25	28,376.00
42809H107 HESS CORP	225.000	12,564.58	16,610.00
438516106 HONEYWELL INTERNATIONAL INC	175.000	7,717.36	17,486.00
458140100 INTEL CORP	570.000	11,106.05	20,685.00
46625H100 JP MORGAN CHASE & CO	480.000	18,589.21	30,038.00
47803W406 JOHN HANCOCK III DISC M/C-IS	26273.109	341,550.42	524,674.00
478160104 JOHNSON & JOHNSON	430.000	27,067.13	44,965.00
49338L103 KEYSIGHT TECHNOLOGIES	100.000	2,106.81	3,377.00
494368103 KIMBERLY CLARK CORP	300.000	19,215.96	34,662.00
50076Q106 KRAFT FOODS GROUP INC	950.000	42,762.54	59,527.00
501889208 LKQ CORPORATION	690.000	19,945.76	19,403.00
532457108 LILLY ELI & CO	215.000	7,730.65	14,833.00
543487326 NATIXIS LOOMIS SAYLES LTD GOV AND AGCY FD CL Y	54180.421	637,434.57	630,118.00
55261F104 M & T BANK CORPORATION	300.000	34,758.00	37,686.00
56062X708 MAINSTAY HIGH YIELD CORP BOND FUND CL I	6592.227	38,630.45	37,905.00
580135101 MCDONALDS CORP	475.000	39,082.25	44,508.00
582839106 MEAD JOHNSON NUTRITION CO CL A	250.000	21,786.31	25,135.00
58502B106 MEDNAX INC	165.000	9,458.58	10,908.00
58933Y105 MERCK & CO INC	880.000	34,159.66	49,975.00
594918104 MICROSOFT CORP	240.000	5,907.50	11,148.00
636274300 NATIONAL GRID PLC SP ADR	750.000	35,883.09	52,995.00
637071101 NATIONAL OILWELL VARCO INC	290.000	16,991.51	19,004.00
65339F101 NEXTERA ENERGY INC	170.000	9,131.82	18,069.00
67011P100 NOW INC.	72.000	1,896.87	1,853.00
674599105 OCCIDENTAL PETROLEUM CORP	160.000	13,268.86	12,898.00
68389X105 ORACLE CORP	280.000	7,312.59	12,592.00
69351T106 PPL CORPORATION	980.000	27,207.20	35,603.00
713448108 PEPSICO INC	150.000	9,484.25	14,184.00
718172109 PHILIP MORRIS INTERNATIONAL	760.000	55,632.66	61,902.00
74144Q203 T ROWE PRICE INSTITUTIONAL EMERGING MARKETS EQUITY FUND	16712.819	502,725.45	494,031.00
741503403 PRICELINE.COM INC	18.000	11,627.53	20,524.00
742718109 PROCTER & GAMBLE CO	585.000	39,737.97	53,288.00
74316J458 CONGRESS MID CAP GROWTH-INS	36954.321	499,537.55	539,533.00
744573106 PUBLIC SERVICE ENT GROUP INC	325.000	10,439.94	13,458.00
747525103 QUALCOMM INC	635.000	27,989.98	47,200.00
74972H648 RS GLOBAL NATURAL RESOURCES FUND CL Y	9507.178	362,276.33	242,243.00
756109104 REALTY INCOME CORP	375.000	15,583.26	17,891.00
761713106 REYNOLDS AMERICAN INC	930.000	33,032.25	59,771.00
77958B402 T ROWE PRICE INSTITUTIONAL FLOATING RATE FUND CL I	5886.834	56,807.95	59,045.00

STATEMENT - INV

**HANS AND CLARA ZIMMERMAN FOUNDATION**  
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922908728 VANGUARD TOTL STK MKT IND-AD	41785.190	1,906,453.73	2,156,116.00
92343V104 VERIZON COMMUNICATIONS	1045.000	37,965.98	48,885.00
92345Y106 VERISK ANALYTICS INC CL A	445.000	16,169.72	28,502.00
92826C839 VISA INC CL A SHARES	105.000	9,294.72	27,531.00
92857W308 VODAFONE GROUP PLC SP ADR	766.000	36,954.61	26,174.00
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969457100 WILLIAMS COMPANIES INC	735.000	28,542.68	33,031.00
G0083B108 ACTAVIS PLC	75.000	11,264.85	19,306.00
G97822103 PERRIGO COMPANY PLC	190.000	29,577.30	31,760.00
<b>Investments Other</b>		<b>12,179,568.69</b>	<b>13,798,373.00</b>

# How to Apply for Scholarships

## 2015-2016 Academic Year Scholarships

The application period for 2015-2016 scholarships began December 1, 2014 and will end at 4 p.m. (HST) on February 19, 2015. For successful submission of your online application please read ALL the instructions listed below.

### Step 1 Create an Account & Log In

Create an account for yourself by providing a username and password. You will also need to provide a valid email address. You may save and return to your application at any time by using your login information.

First time applicants: Click on the link below to create a new account using a valid email address. You may save and return to your application at any time by using your login information.

Returning Applicants: Do NOT create a new account. Please use your existing username and password to log in. If you do not remember your login information or are experiencing issues logging in, please email us at [scholarships@hcf-hawaii.org](mailto:scholarships@hcf-hawaii.org).

### Step 2 Complete the Basic Application

Complete all required Personal Information, Academic Information, Financial Information and the Personal Statement. Our online common application will match you to all the funds you are eligible for, based on the information you submit. We recommend that you complete the application as completely as possible, as it improves your chances of matching to more scholarships.

### Step 3 Upload Supporting Materials

Upload an electronic or PDF copy of your most recent grade transcript or GED scores (if a transcript is not available) and your 2015-2016 Student Aid Report (SAR), generated by your processed FAFSA to your application. Your Personal Statement can be copied and pasted onto your application. Learn more about supporting materials.

### Step 4 Complete the Optional Sections

Submitting Letters of Recommendation and completing the Additional Questions/Essays section may qualify you for additional scholarships.

### Step 5 Review & Submit

Before you submit your application, please review your information and complete the certification section. Note: You will not be able to submit your application until all required supporting documents are electronically attached to your application. You can check the submission status of your application under **Applicant Home**. Once you submit your online application, you will not be able to make changes to your application or upload additional documents.

We recommend that you start early and avoid waiting until the last day to complete your application! Our deadline is final and we do not accept applications or supporting materials past the deadline.

**NEW EARLY DEADLINE:** Start early! Submit your application by January 30, 2015 and HCF will review it to ensure that all required supplementary materials are properly submitted (i.e. SAR and grade transcript). HCF will notify you if your supplementary documents are not acceptable and you will have an opportunity to make any necessary revisions. Please note that you must resubmit by the final deadline to be considered for scholarships.

**The FINAL DEADLINE to submit your complete the online application is 4:00 p.m. (HST) on February 19, 2015.**

If you have questions, please email HCF Scholarships or call 808-566-5570 (or toll-free from neighbor islands: 1-888-731-3863).



# Supporting Materials

## 2015-2016 Academic Year Scholarships

Personal Statement – This can be copied/pasted from an electronic document or composed directly in the application.

### Grade Transcript

Request a grade transcript from your school registrar and upload this document to your online application. **A printout of a grade summary or report card is NOT acceptable as a transcript and will not be considered.**

- **Current College students:** *If you are returning to college for another year, you must upload your most recent transcript issued and printed by your school's registrar's office. HCF WILL NOT accept the University of Hawaii STAR system transcript.*
- **First Year College Students** (i.e. High School Seniors and GED recipients): If you will be attending college for the first time, you will need to request a transcript from your high school counselor or registrar. Your transcript must include your senior year, Fall Semester grades. If you have not attended college before and received a GED, scan and upload your GED diploma. Upload your grade transcript to your application.
- **Unofficial transcripts are acceptable.** Please know it must include the following: institution name/logo, your full name, class standing (i.e. grade level), course history, grades for each course, and Cumulative Grade Point Average. **Grade reports pasted on an editable document (i.e. Word, Notes, Text) will not be accepted.**

**NOTE:** If the transcript is not an original issued to you by the registrar's office, the validity of your transcript is up to the discretion of HCF's Scholarship staff. Any transcripts under suspicion of doctoring and editing will be eliminated from review and the applicant will not be considered for awards.

### Student Aid Report (SAR)

Copy of your 2015-2016 Student Aid Report (SAR) to upload to your online application;

To receive an SAR, complete a 2015-2016 Free Application for Federal Student Aid (FAFSA). After your FAFSA has been processed, you will receive a PDF of your SAR, which can take at least five (5) business days to receive. The FAFSA Summary Report you receive immediately upon submitting your FAFSA is NOT your SAR.

*Note: You will be able to complete the 2015-2016 FAFSA starting January 1, 2015, when the application opens online. We highly recommend you fill out your FAFSA as soon as possible to allow enough time for your SAR to be processed. You will not be able to submit your scholarship application without it.*

Upload a scanned PDF copy of your SAR, which must include your name and an Estimated Family Contribution (EFC) number for the 2015-2016 academic year. You are required to upload ALL pages of your SAR.

You may also access a copy of your SAR by visiting [www.fafsa.ed.gov](http://www.fafsa.ed.gov) and clicking on "View and print your Student Aid Report."

Click here to see a sample SAR. Please note that you must upload ALL the pages of your 2015-2016 SAR.

### Personal Statement

All applicants are required to submit a two-page (max.1,200 words) Personal Statement, which includes your educational, career, and personal goals. You should also include other information that

will demonstrate that you are a worthy scholarship recipient. Your personal statement should describe any outstanding attributes and talents.

Your Personal Statement is not limited to answering the following questions, but they must be addressed:

- What are your reasons for attending college?
- Why did you choose your course of study?
- What career goals do you have?

**New section:** There is now a required short essay on our common application. Applicants must answer the following question in a one-page (max. 600 words) statement: How do you plan to give back to Hawai'i?

**Tip:** Take the time to reflect on your current and future goals and why you're choosing to pursue those goals. You may compose your essays on a Word document (or equivalent) and then copy and paste it to your application so as to avoid the system timing out after 30 minutes.

### **Additional Documents**

There are scholarships that request additional information. This could be a few questions, short essay prompt or supplementary documents. Although these sections are optional, we highly recommend that you review and complete these sections if they are relevant to you. You may be considered for additional scholarships. Please allow more time to complete these sections.

### **Optional (though highly recommended):**

#### **Letters of Recommendation**

Some scholarship funds require applicants to submit Letters of Recommendation (LOR). Once you enter your recommenders' names and email addresses on your application, our system will immediately generate an email to that recommender, informing him/her of your request with a recommendation form to complete and submit to us. You can view the status of your Letters of Recommendation on your application and send a reminder email to your recommenders if they did not submit the LOR form.

We suggest you contact your potential recommenders to confirm their participation, request their email address, and inform them that they will be receiving an email from **notify@ngwebsolutions.com**. This is the source that sends out the request when you enter your recommender(s) email address on your scholarship application.

Please request that your recommender(s) check their spam/junk mail folder periodically for emails from this source. Your Letters of Recommendation can come from a previous or current instructor, school counselor, club advisor, coach, employer and/or church leader as they can usually comment on overall character, achievement, and promise. Letters from parents, friends, and relatives will not be accepted. *Reminder: DO NOT submit paper copies of your letters.*

#### **Essay**

Certain scholarship funds require an additional essay. Essays do not replace your Personal Statement. Scholarship funds requiring an essay rely heavily on this extra piece when final decisions are being made.

#### **Deadline**

Online application will close at 4:00 pm (Hawaii Standard Time) on February 19, 2015. For questions, please email HCF Scholarships or call our staff at 808-566-5570 or toll-free at 1-888-731-3863.

# Dr. Hans and Clara Zimmerman Foundation Education Scholarship

Major in Education with emphasis on classroom teaching.

Requirements:

- Major in Education with emphasis on classroom teaching.
- Minimum GPA 2.8.
- Preference given to applicants with two or more years of classroom teaching experience and who are returning to school.
- Two letters of recommendation required. The letters should include an evaluation of the applicant's classroom teaching effectiveness.
- Applicants must provide information about their teaching philosophy and how that philosophy is being applied in the classroom today.
- Be a resident of the State of Hawaii.
- Demonstrate financial need.
- Attend an accredited two or four year college or university as either an undergraduate or graduate student.
- Be a full-time student.

# Dr. Hans and Clara Zimmerman Foundation Health Scholarships

Dr. Hans Zimmerman established this foundation to provide financial assistance to individuals in Hawai'i wishing to pursue an education in a health field. During his long and productive career in Hawai'i, Dr. Zimmerman encouraged countless individuals to choose careers in medicine. At his death, additional assets came into the foundation so that it is now one of the largest scholarship funds in Hawai'i.

Requirements:

- Plan to major in a health-related field (not including sports medicine, psychology unless clinical, social work).
- Be a college senior or graduate student.
- Minimum GPA 3.0.
- Be enrolled Full-Time.
- Be a resident of the State of Hawaii.
- Demonstrate financial need.
- Attend an accredited four year college or university in the United States.

# Application for Extension of Time To File an Exempt Organization Return

OMB No. 1545-1709

Department of the Treasury  
Internal Revenue Service

► File a separate application for each return.

► Information about Form 8868 and its instructions is at [www.irs.gov/form8868](http://www.irs.gov/form8868).

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form).

**Do not complete Part II unless** you have already been granted an automatic 3-month extension on a previously filed Form 8868.

**Electronic filing (e-file)**. You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit [www.irs.gov/efile](http://www.irs.gov/efile) and click on *e-file for Charities & Nonprofits*.

## Part I Automatic 3-Month Extension of Time. Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete

Part I only ☐

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

		Enter filer's identifying number
Type or print	Name of exempt organization or other filer, see instructions.	Employer identification number (EIN) or
	<b>HANS AND CLARA ZIMMERMAN FOUNDATION</b>	<b>99-6006669</b>
File by the due date for filing your return. See instructions	Number, street, and room or suite no. If a P.O. box, see instructions.	Social security number (SSN)
	<b>P. O. BOX 3170, DEPT 715</b>	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions.	
	<b>HONOLULU, HI 96802</b>	

Enter the Return code for the return that this application is for (file a separate application for each return)

**04**

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720 (other than individual)	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

### BANK OF HAWAII

- The books are in the care of ► **130 MERCHANT ST., HONOLULU, HI - 96813**
- Telephone No. ► **808-694-4393** Fax No. ►

- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) . If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for

- 1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until **AUGUST 15, 2015**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:
- ☒ calendar year **2014** or
- ☐ tax year beginning , and ending .

- 2 If the tax year entered in line 1 is for less than 12 months, check reason: ☐ Initial return ☐ Final return ☐ Change in accounting period

3a If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	<b>28,588.</b>
b If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$	<b>23,588.</b>
c <b>Balance due.</b> Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions	3c	\$	<b>5,000.</b>

**Caution.** If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** and check this box ☒ **X**

**Note.** Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** (on page 1).

**Part II Additional (Not Automatic) 3-Month Extension of Time.** Only file the original (no copies needed).

Enter filer's identifying number, see instructions

Type or print  File by the due date for filing your return. See instructions.	Name of exempt organization or other filer, see instructions.	Employer identification number (EIN) or
	<b>HANS AND CLARA ZIMMERMAN FOUNDATION</b>	<b>99-6006669</b>
	Number, street, and room or suite no. If a P O box, see instructions.	Social security number (SSN)
	<b>P. O. BOX 3170, DEPT 715</b>	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions.	
	<b>HONOLULU, HI 96802</b>	

Enter the Return code for the return that this application is for (file a separate application for each return)

**0 4**

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01		
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720 (other than individual)	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

**STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.**

**BANK OF HAWAII**

- The books are in the care of **130 MERCHANT ST., HONOLULU, HI - 96813**

Telephone No **808-694-4393**

Fax No. ☐

- If the organization does not have an office or place of business in the United States, check this box ☐

- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ☐. If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for

**4** I request an additional 3-month extension of time until **NOVEMBER 15, 2015.**

**5** For calendar year **2014**, or other tax year beginning \_\_\_\_\_, and ending \_\_\_\_\_

**6** If the tax year entered in line 5 is for less than 12 months, check reason: ☐ Initial return ☐ Final return

☐ Change in accounting period

**7** State in detail why you need the extension

**ADDITIONAL TIME IS NEEDED TO GATHER THE INFORMATION NECESSARY TO FILE A COMPLETE AND ACCURATE RETURN**

<b>8a</b> If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions	<b>8a</b>	\$	<b>28,588.</b>
<b>b</b> If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868.	<b>8b</b>	\$	<b>28,588.</b>
<b>c</b> <b>Balance due.</b> Subtract line 8b from line 8a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System) See instructions	<b>8c</b>	\$	<b>0.</b>

**Signature and Verification must be completed for Part II only.**

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature ☐

Title ☐

Date ☐

Form 8868 (Rev 1-2014)