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Return of Private Foundation

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

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

OMB No 1545-0052

Open to Public Inspection

Department of the Treasury Internal Revenue Service

▶ Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf 03/31, 20 15 For calendar year 2014 or tax year beginning 04/01 , 2014, and ending A Employer identification number Name of foundation 20-1078653 THERESE PLUNKETT FOUNDATION 430767012 B Telephone number (see instructions) Number and street (or P O box number if mail is not delivered to street address) Room/suite 200 BELLEVUE PARKWAY, SUITE 220 302-246-5000 City or town, state or province, country, and ZIP or foreign postal code C If exemption application is pending, check here WILMINGTON, DE 19809 Initial return Initial return of a former public charity G Check all that apply. D 1 Foreign organizations, check here . Final return Amended return 2 Foreign organizations meeting the 85% test, check here and attach Name change Address change computation H Check type of organization: X Section 501(c)(3) exempt private foundation E If private foundation status was terminated Other taxable private foundation Section 4947(a)(1) nonexempt charitable trust under section 507(b)(1)(A), check here . J Accounting method: X Cash ___ Accrual I Fair market value of all assets at F If the foundation is in a 60-month termination Other (specify) end of year (from Part II, col. (c), line under section 507(b)(1)(B), check here . (Part I, column (d) must be on cash basis) 161 ▶ \$ 3,941,376. (d) Disbursements Part I Analysis of Revenue and Expenses (The (a) Revenue and (b) Net investment (c) Adjusted net for charitable total of amounts in columns (b), (c), and (d) expenses per income ıncome purposes may not necessarily equal the amounts in books (cash basis only) column (a) (see instructions)) Contributions, gifts, grants, etc., received (attach schedule) . Check If the foundation is not required to attach Sch B STMT 18 19 3 Interest on savings and temporary cash investments. 76,443 75.954 4 Dividends and interest from securities . . . 5a Gross rents Net rental income or (loss) 164,010 Net gain or (loss) from sale of assets not on line 10 Gross sales price for all assets on line 6a ဗ္ဗ 164,010 7 Capital gain net income (from Part IV, line 2) . 8 Net short-term capital gain. . Income modifications . 10a Gross sales less returns and allowances . . . OGDEN, UT b Less Cost of goods sold . c Gross profit or (loss) (attach schedule) STMT 30 30 Other income (attach schedule) 11 240.501 240,013 12 Total. Add lines 1 through 11 15.607 31,215 15,607 13 Compensation of officers, directors, trustees, etc . . . 14 Other employee salaries and wages 15 Pension plans, employee benefits 16a Legal fees (attach schedule) Accounting fees (attach schedule) . . . **Administrative** 10,168 10,168 Other professional fees (attach scheduler . 4 . 17 10,623 Taxes (attach schedule) (see instructions). 5. 1,076 18 19 Depreciation (attach schedule) and depletion. 20 Travel, conferences, and meetings 21 and 22 Printing and publications 10 Operating Other expenses (attach schedule) STMT.6. 159 149 23 24 Total operating and administrative expenses. 52,165 27,000 15,617. Add lines 13 through 23. 188,813. 188,813 Contributions, gifts, grants paid 204,430. 240,978 27,000 26 Total expenses and disbursements Add lines 24 and 25 Subtract line 26 from line 12: -477 8 Excess of revenue over expenses and disbursements 213,013 b Net investment income (if negative, enter -0-) c Adjusted net income (if negative, enter -0-). . Form 990-PF (2014)

JSA For Paperwork Reduction Act Notice, see instructions.

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2 20-1078653

Page	4

Part II		Attached schedules and amounts in the	Beginning of year	End o	f year
iż.	art II	Balance Sheets description column should be for end-of-year amounts only (See instructions)	(a) Book Value	(b) Book Value	(c) Fair Market Value
П	1.1	Cash - non-interest-bearing		125.	125.
	2	Savings and temporary cash investments	147,238.	232,073.	232,073.
	3	Accounts receivable ▶	•		
		Less allowance for doubtful accounts ▶			
	4	Pledges receivable			
		Less allowance for doubtful accounts ▶			
	5	Grants receivable , , ,	_		
	6	Receivables due from officers, directors, trustees, and other			
		disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule)			
		Less allowance for doubtful accounts ▶	_		
ts	8	Inventories for sale or use		_	
ssets		Prepaid expenses and deferred charges			
Ä		Investments - U.S. and state government obligations (attach schedule).	410,473.		
	b	Investments - corporate stock (attach schedule)	1,505,582.		
	С	Investments - corporate bonds (attach schedule)	298,491.		
	11	Investments - land, buildings, and equipment basis Less accumulated depreciation (attach schedule)			
	12	Investments - mortgage loans			<u> </u>
	13 14	Investments - other (attach schedule)	467,793.	2,597,259.	<u>3,709,178</u> .
		equipment basis Less accumulated depreciation			
	15	(attach schedule)			
		Other assets (describe) Total assets (to be completed by all filers - see the			
		instructions Also, see page 1, item I)	2,829,577.	2,829,457.	3,941,376.
_		Accounts payable and accrued expenses	2,025,511.	2,027,437.	3/341/370.
				-	
	18	Grants payable			
ties	19	Deferred revenue			
Liabilities	20	Loans from officers, directors, trustees, and other disqualified persons			
Ľ.	21 22	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe			
	23	Total liabilities (add lines 17 through 22)		NONE	
_		Foundations that follow SFAS 117, check here . >			
		and complete lines 24 through 26 and lines 30 and 31.			
ces	24	Unrestricted			
a	25	Temporarily restricted			<u>'</u>
Ba	26	Permanently restricted · · · · · · · · · · · · · · · · · · ·			
Б	- "	Foundations that do not follow SFAS 117, ▶ 🗓			
3		check here and complete lines 27 through 31.			
ō	27	Capital stock, trust principal, or current funds	2,829,577.	2,829,457.	
Net Assets or Fund Balances	28	Paid-in or capital surplus, or land, bldg , and equipment fund	<u> </u>		
ASS	29	Retained earnings, accumulated income, endowment, or other funds			
et /	30	Total net assets or fund balances (see instructions)	2,829,577.	2,829,457.	
ž	31	Total liabilities and net assets/fund balances (see			
	•	instructions)	2,829,577.	2,829,457.	
P	art II	Analysis of Changes in Net Assets or Fund Bala			
		al net assets or fund balances at beginning of year - Part		must agree with	
		of-year figure reported on prior year's return)			2,829,577.
2		er amount from Part I, line 27a			-477.
3	Oth	er increases not included in line 2 (itemize) ▶2014 RETURN	OF CAPITAL ADJUSTMENT M	ADE FED 2015 3	364.
		l lines 1, 2, and 3			2,829,464.
		reases not included in line 2 (itemize) ▶GALES GAIN ROUNDIN		5	7.
		al net assets or fund balances at end of year (line 4 minus l			2,829,457.
_		<u> </u>			Form 990-PF (2014)

Part IV Capital Gain	s and Losses for Tax on Inve	estment Income			rage 2
	nd describe the kind(s) of property sold (s		(b) How acquired	(c) Date	(d) Date sold
, ,	brick warehouse, or common stock, 200	• .	P - Purchase D - Donation	acquired (mo , day, yr)	(mo, day, yr)
1a PUBLICLY TRADED	SECURITIES		D - Donation		
b					
<u> </u>					
d					
е		-		- <u>-</u>	
(e) Gross sales price	(f) Depreciation allowed	(g) Cost or other basis		(h) Gain or (lo	
(e) Gross sales price	(or allowable)	plus expense of sale		(e) plus (f) mini	us (g)
a 685,067.		521,057.			164,010.
b			. <u></u>		
c					
d					
<u>e</u>					
Complete only for assets	showing gain in column (h) and owned	by the foundation on 12/31/69		Gains (Col (h) ga	
(i) F M V as of 12/31/69	(j) Adjusted basis	(k) Excess of col (i)	col	(k), but not less t Losses (from co	
	as of 12/31/69	over col (j), if any		LUSSES (IIOIII CO	
8					164,010.
b					
<u>C</u>					
<u>d</u>					
<u>e</u>		<u> </u>			
2 Capital gain net income		gain, also enter in Part I, line 7			164 010
. •	(II	(loss), enter -0- in Part I, line 7	2	<u> </u>	164,010.
	ain or (loss) as defined in sections 1				
-	Part I, line 8, column (c) (see inst				
	Under Section 4940(e) for Red		3		
If section 4940(d)(2) applies	, leave this part blank.				
Alos Abo formulation habita fo	r the section 4942 tax on the distrib	suitable amount of any year in the b		طء <u> </u>	Yes X No
	not qualify under section 4940(e)		ase perio	u] les [A lto
	mount in each column for each year		g any ent	ries.	
(a)	(b)	(c)	j uny une	(d)	
Base period years Calendar year (or tax year beginning in)	Adjusted qualifying distributions	Net value of noncharitable-use assets	ĺ	Distribution ra (col (b) divided by	
2013	178,341.	3,629,831.		(00) (0) 0.11000 2)	0.049132
2013	165,288.	3,227,907.	 		0.051206
2011	175,246.	3,104,357.			0.056452
2010	163,145.	3,066,788.			0.053197
2009	169,676.	2,925,445.			0.058000
2 Total of line 1. column	(d)		2		0.267987
	no for the 5-year base period - divide				
•	indation has been in existence if les	•	3		0.053597
4 Enter the net value of n	oncharitable-use assets for 2014 fro	om Part X. line 5	4	3	,844,438.
4 Entor the net value of h	5/10/10/10/10/10/10/10/10/10/10/10/10/10/	,, a.,,,			
5 Multiply line 4 by line 3			5		206,050.
• Manapiy into 4 by into 0					
6 Enter 1% of net investm	nent income (1% of Part I, line 27b)		6		2,130.
A FUTCH 1/0 OF HEL HINGSHI					•
7 Add lines 5 and 6			7		208,180.
. , ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,					
8 Enter qualifying distribu	itions from Part XII, line 4		8		204,430.
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% ta	x rate. See th
Part VI instructions.					

Par	Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 494	8 - see i	nstru	ctions	s)
1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ and enter "N/A" on line 1)				
L	Date of ruling or determination letter (attach copy of letter if necessary - see instructions)				
þ	Domestic foundations that meet the section 4940(e) requirements in Part V, check			4,2	60.
	here and enter 1% of Part I, line 27b	1			
С	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-)	<u> </u>			
3	Add lines 1 and 2			4,2	
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	 			ONE
5	Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0			4,2	<u>60.</u>
6	Credits/Payments				
а	2014 estimated tax payments and 2013 overpayment credited to 2014 6a 3,384.				
b	Exempt foreign organizations - tax withheld at source				
C	Tax paid with application for extension of time to file (Form 8868) 6c NONE				
d	Backup withholding erroneously withheld				
7	Total credits and payments Add lines 6a through 6d			3,3	84.
8	Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached 8	1			11.
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	-		8	<u> 187.</u>
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid				
11	Enter the amount of line 10 to be Credited to 2015 estimated tax NONE Refunded 11	1			
	t VII-A Statements Regarding Activities			1	
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation of		4-	Yes	No
	participate or intervene in any political campaign?		1a		<u> X</u>
D	Did it spend more than \$100 during the year (either directly or indirectly) for political purpos	es (see	1ь		Х
	Instructions for the definition)?		10		
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any in	materiais			
	published or distributed by the foundation in connection with the activities		1c		Х
	Did the foundation file Form 1120-POL for this year?				
u	(1) On the foundation \$\\$ \\$ \\$ \\$ \\$ \\$ \\$ \\$ \\$ \\$ \\$ \\$ \\$				
۵	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imp	osed on			
	foundation managers > \$	0.,			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?		2		Х
	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, as	ticles of			
	incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		3		X
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?		4a		X
Ь	If "Yes," has it filed a tax return on Form 990-T for this year?		4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?		5		X
	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	ons that			
	conflict with the state law remain in the governing instrument?		6	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	7	X	<u> </u>
8a	Enter the states to which the foundation reports or with which it is registered (see instructions)				
_	CA				
Ь	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney		0.	v	
_	(or designate) of each state as required by General Instruction G? If "No," attach explanation		8b	Х	_
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942				
	4942(j)(5) for calendar year 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)?		9		X
	complete Part XIV		-		<u> </u>
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule lists	-	10		X
	names and addresses			n.PF	

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). 12 Did the foundation comply within the public inspection requirements for its annual returns and exemption application? 13 X 15 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? 15 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? 15 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? 16 The books are in care of ▶ RELIANCE TRUST CONPANY OF DELAWARE Telephone no ▶ (302) 246-5000 17 Telephone no ▶ (1302) 246-5000 18 Section 434(14) in onexempt interest received or accrued during the year. 18 Section 434(14) in onexempt interest received or accrued during the year. 18 At any time or care the Francisal secount in a foreign country. 18 At any time during clientary are 2104, did the foundation have an interest in or a signature or other submotivity over a bank, securities, or other financial secount in a foreign country? 18 At any time during clientary are 2104, did the foundation have an interest in or a signature or other submotivity over a bank, securities, or other financial secount in a foreign country? 18 At any time during clientary are 2104, did the foundation from the annual foreign country. 19 Telephone in easier or exchange of the foundation in disqualified person? 10 Diring the year did the foundation (client directly or indirectly). 11 Finges in the same of the foreign country. 12 Diring the year did the foundation (client directly or indirectly). 13 Diring the year did the foundation (client directly or indirectly). 14 Pay complementation to, or year or reminute the expension of section applications are provided to a security of the acst falls of such as a security of the security of the security of the sec	Pari	VII-A Statements Regarding Activities (continued)			
meaning of faction 51 2(h)(13) if "Yes," attach schedule (see instructions). Did the foundation make a distribution to a donor advected find over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions). 10 bit the foundation comply with the public inspection requirements for its annual returns and exemption application? 11 The books are in care or ■ REJIANCE TRUST COMPANY OF DELAWARE Telephone no ▶ (322) 255 5.00 □ 12 The books are in care or ▶ REJIANCE TRUST COMPANY OF DELAWARE Telephone no ▶ (322) 255 5.00 □ 13 X □ 14 The books are in care or ▶ REJIANCE TRUST COMPANY OF DELAWARE Telephone no ▶ (322) 255 5.00 □ 15 Section 4947(s)(1) nonexempt charitable trusts filing form 990-F in lieu of Form 1041. Check here □ □ 15 □ 16 At any time during calendar year 2014, did the foundation have an interest in or a signature or other 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 No 2 □ 14 □ 15 □ 16 □ 16 □ 16 □ 16 □ 16 □ 16 □ 16			Τ.		
12 but the foundation make a distribution to a denic advised fund over which the foundation or a disqualified person? 13 bid the foundation comply with the public inspection requirements for its annual returns and exemption application? 14 The books are in case of ▶ RELIANCE TRUST COMPANY OF DELAWARE Telephone no ▶ (320) 246-5000 15 Section 434/1811 monecomply charable trusts filing form 390 PF in level of Form 1041 Check here ▶ 19809 15 Section 434/1811 monecomply charable trusts filing form 390 PF in level of Form 1041 Check here ▶ 18 A any time during claimed charable trusts filing form 390 PF in level of Form 1041 Check here ▶ 18 A any time during claimed roar 2014, dut the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country ▶ 18 A any time during claimed and the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country ▶ 18 A any time during claimed and the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country ▶ 20 A and the foundation (either directly or indirectly) 15 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. 15 Diarrow money from, lend money to, or otherwise extend circuit to for accept it from) a disqualified person?	•		11	,	X
person had advision privileges? If "Yes," statisch statement (see instructions) 10 bit the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ N/A 11 The books are in care of ▶ RELITANCE TRUST COMPANY OF DELAWARE Located at ▶ 200 BELIEVUE PARKWAY STE 220, WILMINGTON, DE ZIP+4 ▶ 1999. 15 Section 4947(a)(1) inosecompt charitable trusts friing form 990-Fr in leu of Form 1041. Check hare in an admittent amount of tax-exempt interest recovered or accused during the year. 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 filting requirements for FinCEN Form 114, (formerly TD F 90-221) if Yes Not Yes and Yes a	12				
Website address ▶ N/A 14 The books are in care of ▶ RELIANCE TRUST COMPANY OF DELAWARS Telephone no ▶ (302) 246-5000 Located at ≥ 200 BELLEVUE PARKWAY STE 220, WILMINGTON, DB 20+4 ▶ 19909 15 Section 4947(a)(1) nonexempt charisable trusts filing form 990-FF in lieu of Form 1041 Check here			12	اا	<u>X</u>
Website address ► N/A	13	•	13	X	
Located at			. 		
Located at	14	The books are in care of ▶ RELIANCE TRUST COMPANY OF DELAWARE Telephone no ▶ (302) 246	-500	0	
and enter the amount of tax-exempl interest received or accoused during the year. 16			_ 		
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 90-221) If Yes, enter the name of the foreign country. PORT VIPE Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 1a During the year did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person?	15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here		▶	
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 1/16, and 1/16 the instructions for exceptions and filing requirements for FinCEN Form 114, (formerly TD F 90-22 1) If 1/16, and 1/16 the instructions for exceptions and filing requirements for FinCEN Form 114, (formerly TD F 90-22 1) If 1/16, and 1/16 the instructions for FinCEN Form 114, (formerly TD F 90-22 1) If 1/16, and 1/16,		and enter the amount of tax-exempt interest received or accrued during the year			
See the instructions for exceptions and filing requirements for FinCEN Form 114, (formerly TD F 90-22 t) If "Yes," enter the name of the foreign country Part VIIB3 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.	16		/ ₁	Yes	
Part VIB 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		over a bank, securities, or other financial account in a foreign country?	16	Щ	<u>X</u>
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 1 a During the year did the foundation (either directly or indirectly) (1) Engage in the sele or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept it them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? (6) Agree to pay money or property to a government official? (Exception, Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). b If any answer is "Yes" to 1a(1)-(6), did any of the acts fall to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2014? 2 Taxes on failure to distribute income (section 4942(does not apply for years the foundation was a private operating foundation defined in section 4942(i)(3) or 4942(i)(5)) a At the end of tax year 2014, did the foundation have any undistributed income (times 6d and 6e, Part XIII) for tax year(s) beginning before 2014? if "Yes," list the years Is to a 4942(a)(2) are being applied to any of the years listed in 2a, list the years here A 2a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? b H "Yes," did it have excess business holdings in 2014 as a result of (1) any purchases by the foundation or disqualified persons after May 26, 1959, (2		, , , , , , , , , , , , , , , , , , , ,	f		
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 1a During the year did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person?			J		
1a During the year did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person?	Par		1	V	NI.
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	_	·		Yes	IVO
22 Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	1a				
disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)3 or in a current notice regarding disaster assistance (see instructions)? C) Organizations relying on a current notice regarding disaster assistance (see instructions)? 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 yeer beginning in 2014? 2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(i)(3) or 4942(i)(6)) a At the end of tax year 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(3) beginning before 2014? If "Yes," list the years b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) to all years listed, answer "No" and attach statement -see instructions) c) If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here					
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?					
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?					
(5) Transfer any income or assets to a disqualified person)? (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). b if any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2014? 2 Taxes on failure to distribute income (section 4942)(j0s or 4942(j)(5)) a At the end of tax year 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement -see instructions) c if the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here 3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? b If "Yes," did it have excess business holdings in 2014 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(a)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C. Form 4720, to determine if the foundation had excess business holdings in 2014) 4a Did the foundation make any investment in a prior year (but after December 31, 1969) that					
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Organizations relying on a current notice regarding disaster assistance check here. c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2014? 2 Taxes on failure to distribute income (section 4942()(3) or 4942()(5)) a At the end of tax year 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions) c if the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here	b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations	Í		
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2014?		section 53 4941(d)-3 or in a current notice regarding disaster assistance (see instructions)7	1b		<u>X</u>
were not corrected before the first day of the tax year beginning in 2014?		Organizations relying on a current notice regarding disaster assistance check here			-
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a At the end of tax year 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014?	2				
6e, Part XIII) for tax year(s) beginning before 2014?		4			
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) to all years listed, answer "No" and attach statement -see instructions)	а	L L	1		
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all years listed, answer "No" and attach statement - see instructions) c if the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here	U				
c if the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here			2h	'	X
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	c				
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	·				
at any time during the year?	3a				
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)					
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)	b				
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)		disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the			
foundation had excess business holdings in 2014)		Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of			
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 20147 4b X		the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the			
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 20147 4b X				<u> </u>	<u> </u>
charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2014? 4b X			4a	<u> </u>	<u>X</u>
	b				
e Dun DE 1884				n_PE	

Part	VII-B	Statements Regarding Activities for	<u>or Which Form 4</u>	720 May Be Requ	uired (continued)		
5a	During the	e year did the foundation pay or incur any amou	unt to.		<u> </u>		
	(1) Carry	on propaganda, or otherwise attempt to influer	ice legislation (section	1 4945(e)) ⁷	Yes X No		
	(2) Influe	nce the outcome of any specific public ele	ction (see section 4	955), or to carry on	,		
	directi	y or indirectly, any voter registration drive?			Yes X No		
		le a grant to an individual for travel, study, or of					
		le a grant to an organization other than a					
		n 4945(d)(4)(A)? (see instructions)	_		[]		
		le for any purpose other than religious, ch					
		ses, or for the prevention of cruelty to children		•		.	
ь		swer is "Yes" to 5a(1)-(5), did any of the				,	
		is section 53 4945 or in a current notice regard		•	•	5b	
	Organizati	ons relying on a current notice regarding disas	ter assistance check l	nere			
С	_	swer is "Yes" to question 5a(4), does the					
_		maintained expenditure responsibility for the g		•			
		tach the statement required by Regulations sec					
6a		oundation, during the year, receive any fun		ectly, to pay premium	ns		
		onal benefit contract?	•		Yes X No	,	
ь		undation, during the year, pay premiums, direct			ct ⁷	6ь	Х
		6b, file Form 8870	, ,, ,				
7a		e during the tax year, was the foundation a pai	ty to a prohibited tax	shelter transaction?.	Yes X No		
ь	•	d the foundation receive any proceeds or have	•			7b	
Par	VIII	Information About Officers, Director	rs, Trustees, Fou	ndation Managers	s, Highly Paid Emp	oloyees,	
1	list all off	and Contractors icers, directors, trustees, foundation ma	maners and their	omnensation (see	instructions)		
			(b) Title, and average	(c) Compensation	(d) Contributions to	(e) Expens	se account,
		(a) Name and address	hours per week devoted to position	(If not paid, enter -0-)	employee benefit plans and deferred compensation	other all	owances
RELIA	NCE_TRUST	COMPANY OF DELAWARE	TRUSTEE				
200 B	ELLEVUE PA	ARKWAY STE 220, WILMINGTON, DE 19809	1	31,215.	-0-		-0-
						1 44	
2	Compens "NONE."	ation of five highest-paid employees	(otner than thos	e included on line	e 1 - see instruction	ns). If n	one, enter
			(b) Title, and average		(d) Contributions to employee benefit	(a) Evnani	se account,
(a)	Name and a	ddress of each employee paid more than \$50,000	hours per week devoted to position	(c) Compensation	plans and deferred	other all	owances
				· · · · · · · · · · · · · · · · · · ·	compensation		
NON	 ?			NONE	NONE	N	ONE
11011				NONE	1401415		OND
		•					
							
Total	number o	of other employees paid over \$50,000				N	ONE
							0-PF (2014)

	Information About Officers, Directors, Trustees, Foundation Mar and Contractors <i>(continued)</i>	nagers, Highly Paid Employ	yees,
3 Five hig	hest-paid independent contractors for professional services (see instru	ctions). If none, enter "NONE	#
	(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE			NONE
NOIN E			NOILE
			-
otal number	of others receiving over \$50,000 for professional services		NONE
Part IX-A	Summary of Direct Charitable Activities		
	ation's four largest direct charitable activities during the tax year. Include relevant statistical and other beneficiaries served, conferences convened, research papers produced, etc.	information such as the number of	Expenses
1NONE			
2			
3			
			
4			·
Part IX-B	Summary of Program-Related Investments (see instructions)		
	wo largest program-related investments made by the foundation during the tax year on lines 1 a	nd 2	Amount
1 NONE			
2			
	ram-related investments. See instructions		
3NONE			
fotal. Add lin	es 1 through 3		
			Form 990-PF (20

Part	Minimum Investment Return (All domestic foundations must complete this part. Foreign see instructions.)	gn founda	ations,
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc.,		
	purposes.		
а	Average monthly fair market value of securities	1a _	3,712,750.
b	Average of monthly cash balances	1b	190,233.
	Fair market value of all other assets (see instructions)	1c	NONE
d	Total (add lines 1a, b, and c)	1d	3,902,983.
е	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation)		
2	Acquisition indebtedness applicable to line 1 assets	2	NONE
3	Subtract line 2 from line 1d	3	3,902,983.
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see		
	instructions)	4	58,545.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	3,844,438.
6	Minimum investment return. Enter 5% of line 5	6	192,222.
Part	XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating found and certain foreign organizations check here ▶ □ and do not complete this part)	dations	
1	Minimum investment return from Part X, line 6	1	192,222.
2a	Tax on investment income for 2014 from Part VI, line 5		
	Income tax for 2014. (This does not include the tax from Part VI.)	1	
c	Add lines 2a and 2b	2c	4,260.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	187,962.
4	Recoveries of amounts treated as qualifying distributions	4	NONE
5	Add lines 3 and 4	5	187,962.
6	Deduction from distributable amount (see instructions)	6	NONE
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII,	 •	
•	line 1	7	187,962.
		<u> </u>	101,302.
Part	Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
а	Expenses, contributions, gifts, etc - total from Part I, column (d), line 26	1a	204,430.
. ь	Program-related investments - total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc.,		
	purposes	2	NONE
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	NONE
b	Cash distribution test (attach the required schedule)	3b	NONE
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	204,430.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income.		201,130.
-	Enter 1% of Part I, line 27b (see instructions)	5	N/A
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	204,430.
•	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when co		
	qualifies for the section 4940(e) reduction of tax in those years	alouidung	whether the loundario

Form 990-PF (2014)

Page 9

	1990-PF (2014) To XIII Undistributed Income (see instruc	tions)			Page 9
1 21	Chaistibated income (see instruc	(a)	(b)	(c)	(d)
1	Distributable amount for 2014 from Part XI,	Corpus	Years prior to 2013	2013	187,962.
2	Undistributed income, if any, as of the end of 2014				
_	Enter amount for 2013 only			NONE	
	Total for prior years 20_12_,20,20		NONE		
3	Excess distributions carryover, if any, to 2014				
а	From 2009 24,376.				
b	From 2010				
C	From 2011 23, 24U.				
d	From 2012				
е	From 2013				
f	Total of lines 3a through e	67,757.			
4	Qualifying distributions for 2014 from Part XII,				
	line 4 ▶ \$ 204,430.				
а	Applied to 2013, but not more than line 2a			NONE	
b	Applied to undistributed income of prior years				
	(Election required - see instructions)		NONE		
C	Treated as distributions out of corpus (Election				
	required - see instructions)	NONB			100.000
d	Applied to 2014 distributable amount	76.460			187,962.
е	Remaining amount distributed out of corpus	16,468.			NONE
5	Excess distributions carryover applied to 2014 . (If an amount appears in column (d), the same	NONB			NONE
6	amount must be shown in column (a), the same amount must be shown in column (a) ! Enter the net total of each column as indicated below:				
а	Corpus Add lines 3f, 4c, and 4e Subtract line 5	84,225.			
	Prior years' undistributed income Subtract		NONE		-
С	line 4b from line 2b Enter the amount of prior years' undistributed	-	HONE		
	income for which a notice of deficiency has been issued, or on which the section 4942(a)		NONE		•
	tax has been previously assessed		NONE		
d	Subtract line 6c from line 6b Taxable amount - see instructions		NONE		
е	Undistributed income for 2013 Subtract line		NONE		= 11
	4a from line 2a Taxable amount - see			NONE	
	instructions				
f	Undistributed income for 2014 Subtract lines 4d and 5 from line 1. This amount must be				
	distributed in 2015				NONE
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)	NONE			
8	Excess distributions carryover from 2009 not				
	applied on line 5 or line 7 (see instructions)	24,376.			
9	Excess distributions carryover to 2015.				
	Subtract lines 7 and 8 from line 6a	59,849.			
10	Analysis of line 9				
a	Excess from 2010				
b	Excess from 2011 23,240.				
	Excess from 2012 5, 086.				
	Excess from 2013 3,565.				
е	Excess from 2014 16,468.				Form 990-PF (2014)

1 a	if the foundation has	-		• •	ating	
	· ·	j is effective for 2014, ent	-			1/2
b	Check box to indicate v		is a private operating		section 4942(j)(3) or 4942(j)(5)
2a	Enter the lesser of the ad-	(a) 2014	(F) 2012	Prior 3 years	(4) 2011	(e) Total
	justed net income from Part I or the minimum investment		(b) 2013	(c) 2012	(d) 2011	
	return from Part X for each year listed					
b	85% of line 2a	·				
	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					
е	Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3	Complete 3a, b, or c for the					
а	alternative test relied upon "Assets" alternative test - enter			ļ		
•	(1) Value of all assets					
	(2) Value of assets qualifying under section					
b	4942(j)(3)(B)(i) "Endowment" alternative test-					
	enter 2/3 of minimum invest-					
	ment return shown in Part X, line 6 for each year listed					
С	"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 sup- port from an exempt					
	organization					
Par		ıtarv İnformation ((Complete this par	t only if the found	lation had \$5,000	or more in assets
		during the year - so				J
1		Foundation Manager	-			
а	List any managers of before the close of any	the foundation who h tax year (but only if th	nave contributed moi ney have contributed i	e than 2% of the tota more than \$5,000). (S	al contributions recei ee section 507(d)(2).)	ved by the foundation
	NONE				==-	
b		the foundation who ship or other entity) of				ly large portion of the
	NONE					
2	Information Regarding	Contribution, Grant,	Gift, Loan, Scholarsh	ip, etc., Programs:		
				•	itable organizations	and does not accept
	unsolicited requests for	or funds. If the foundablete items 2a, b, c, and	ation makes gifts, gr	ants, etc (see instruc	tions) to individuals	or organizations under
а	The name, address, an	d telephone number o	r e-mail address of the	e person to whom app	lications should be ac	Idressed:
ь	The form in which app	lications should be sub	omitted and information	on and materials they	should include:	
	···					
C	Any submission deadli	nes:				
	Any contrictions of the	mitotiono en acced-	anah an hii	akaal aasa da s	Listanias Islands	to attack at a second
a	Any restrictions or li factors:	initations on awards,	such as by geogra	apnicai areas, charita	DIE TIEIOS, KINOS OF	institutions, or other

3 Grants and Contributions Paid Durin	g the Year or Appre	oved for F	uture Payment	
3 Grants and Contributions Paid Durin Recipient Name and address (home or business)	If recipient is an individual, show any relationship to	Foundation	Purpose of grant or contribution	Amount
Name and address (home or business)	any foundation manager or substantial contributor	recipient	contribution	
a Paid during the year				
SEE STATEMENT 13				188,813.
			<u> </u>	100 012
Total	 		▶ 3a	188,813.
b Approved for future payment	2			
		:		
		t t		
Total			<u>▶ 3b</u>	

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Form **990-PF** (2014)

iter gross amounts unless otherwise indicated	Unrelat	ted business income	Excluded by	section 512, 513, or 514	(e)
I Program service revenue	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	Related or exempt function income (See instructions)
a					,
b					
c					
d					
е					
f					
g Fees and contracts from government agencies					
Membership dues and assessments		·			
Interest on savings and temporary cash investments			14	18.	
Dividends and interest from securities			14	76,443.	
Net rental income or (loss) from real estate	ļ				
a Debt-financed property					
b Not debt-financed property					
Net rental income or (loss) from personal property .	l	 -			
Other investment income	ļ		+	4.5.4.0.0	
Gain or (loss) from sales of assets other than inventory			18	164,010.	
Net income or (loss) from special events					
Gross profit or (loss) from sales of inventory	 				
Other revenue a			14	20	
b ACCRETION			14	30.	
<u> </u>					
d					
e				240 501	
Subtotal Add columns (b), (d), and (e)				240,501.	240,5
Total. Add line 12, columns (b), (d), and (e) e worksheet in line 13 instructions to verify calci		· · · · · · · · · · · · · · · · · · ·			240,3
me No. Explain below how each activit accomplishment of the foundation	-	•			
	- -	NOT APPLICAE	BLE		

orm 9	90-PF (2	(014)				_ 4	30-10/865			Pa	ge 13
Part	XVII	Information R Exempt Organ		ansfers To and	Transactio	ns and	Relations	ships With N	onchari ,	itable	;
1	Did th	e organization directl	v or indirectly	engage in any of t	he following	with an	v other orga	nization describe	ed ∣	Yes	No
		ion 501(c) of the Co	•		_				I		
		zations?	40 (01			,		J. J	- ·		ĺ
	_										1
		ers from the reporting									37
((1) Ca	sh							1a(1)	 	<u>X</u>
((2) Otl	her assets							1a(2)		X
b	Other	transactions:									ĺ
	(1) Sa	les of assets to a none	charitable exen	not organization					1b(1))	X
		rchases of assets fror									X
									l l	1	X
		ntal of facilities, equip									
		imbursement arrange									X
1	(5) Lo	ans or Ioan guarantee	s						1b(5)	 	X
1	(6) Pe	rformance of services	or membershi	p or fundraising sol	licitations				1b(6)	1	X
C	Sharın	g of facilities, equipm	ent, mailing lis	ts, other assets, or	paid employe	es			1c		X
d I	If the	answer to any of th	e above is "Ye	es," complete the f	following sch	nedule C	Column (b) s	hould always sl	now the	fair m	narket
		of the goods, other									
		in any transaction or									
		(b) Amount involved	ı	noncharitable exempt org				ers, transactions, and			
(a) Lir	ie no	(b) Amount involved	(c) Name of t	ionchantable exempt org	Janization	(u) Desc	inplion of transit	ers, transactions, and	snaring ari	angeme	
_											
					İ						
		•									
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		····									
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		•				-					
								- 			
	-										
2a	ls the	foundation directly	or indirectly af	filiated with, or re	lated to, one	or more	e tax-exempt	organizations			_
	descri	bed in section 501(c)	of the Code (o	ther than section 5	01(c)(3)) or i	n section	527?		. Y	es 🔝	X No
ь	If "Yes	," complete the follow	vina schedule.								_
		(a) Name of organizatio			organization	1	1	c) Description of rela	tionship		
		(4, 10110 01 01 01	<u></u>	1-7 - 7 - 2							
											
				_							
		er penalties of perjury, I decla						o the best of my kno	wledge and	belief, i	t is true,
٥.		ct, and complete Declaration o	f preparer (other than	taxpayer) is based on all into	rmation of which p	reparer nas a	ny knowleage				
Sign			2 1	$P_{ 08/13/2}$	015	VICE	PRESIDEN	ייוין ייוין	e IRS discu		1
Here			, _		.013	Title	TRESTOL			7 1	below
	318	nature of officer or trustee		Date		THE		(see instr	uctions)? X	Yes	No
	A1	DRIANE COOLBAU			/ <u>-</u>	_		_ 			
ר: ים		Print/Type preparer's na	me	reparer's signatur	re 7/ '_1	9/	Date	Check	ıf PTIN		
Paid		WESLEY HIRSC	HBERG	W ESLIM	Kladlh		08/13/2	2015 self-employe	ed P001	622	44
Prep	arer	Firm's name ►ER		NG US LLF					4-6565		
-	Only		5 N WACKE								—
-30	7	3			606	:06		Phone 210	0_070_1	000	
		ı <u>C</u> H	IICAGO, II	<u> </u>	606		-	Phone no 312	2 – 879 – 2 Form 99		
									Form 33	V-PF	(2014)

STATEMENT

RM 990PF, PART I - INTEREST ON TEMPC	RARY CASH INVESTMENTS	
M 990PF, PART I - INTEREST	N TEMPO	H H H H H
M 990PF, PART I - I	ERE	
M 990PF, PART		11 11
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	M 990P	

NET INVESTMENT INCOME	1 1 1 1	19.	19.	
REVENUE AND EXPENSES PER BOOKS		18.	18.	
			TOTAL	
DESCRIPTION	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	MONEY MARKET DIVIDENDS		

SECURITIES	
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AND	
DIVIDENDS	
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PART I	
990PF,	
FORM	

VENUE	ENSES INVESTMENT	ഗ	76,443. 75,954.	1 1 1	76,443. 75,954.	
RI	EXI	DESCRIPTION	DIVIDENDS AND INTEREST FROM SECURITIES		TOTAL	

STATEMENT

FORM 990PF, PART I - OTHER INCOME

DESCRIPTION

ACCRETION OF DISCOUNT

NET INVESTMENT INCOME 1 1 1 EXPENSES PER BOOKS REVENUE AND

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TOTALS

STATEMENT

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90PF, PART I	
ORM 990PF, PART I	

NET INVESTMENT INCOME	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	10,168.	10,168.
REVENUE AND EXPENSES PER BOOKS	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	10,168.	10,168.
DESCRIPTION	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	OTHER ALLOCABLE EXPENSES - 2%	TOTALS

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NET INVESTMENT INCOME	1 1 1 1	1,076.	1,076.
REVENUE AND EXPENSES PER BOOKS	1 1 1 1 1 1 1 1 1 1	1,076. 9,547.	10,623.
DESCRIPTION		FOREIGN TAXES PAID US TREASURY 3/31/14 BALANCE DU	TOTALS

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STATEMENT

OTHER EXPENSES	
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		D			
	NET	INVESTMENT	INCOME	! ! ! !	
REVENUE	AND	EXPENSES	PER BOOKS	!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!	
			DESCRIPTION	4 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	

PER B	INCOME	PER BOOKS INCOME
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STATEMENT

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)767012	/ESTMENTS	COST/ FMV	C OR F	1 1 1 1 1 1	บ	TOTALS
THERESE PLUNKETT FOUNDATION 430767012	RM 990PF, PART II - OTH		DESCRIPTION		SEE STATEMENT ATTACHED	

RECIPIENT NAME: THE HEBREW ACADEMY ADDRESS: 14401 WILLOW LANE HUNTINGTON BEACH, CA 92647 RELATIONSHIP: NONE PURPOSE OF GRANT: PROGRAM SUPPORT FOUNDATION STATUS OF RECIPIENT: PCAMOUNT OF GRANT PAID 10,000. RECIPIENT NAME: HUNTINGTON BEACH MUNICIPAL ART CENTER FOUNDATION ADDRESS: 538 MAIN STREET HUNTINGTON BEACH, CA 92648-5134 RELATIONSHIP: NONE PURPOSE OF GRANT: BEACH PARTNERS IN ART PROGRAM FOUNDATION STATUS OF RECIPIENT: PC

AMOUNT OF GRANT PAID

RECIPIENT NAME:

CHABAD OF WEST ORANGE

COUNTY

ADDRESS:

5052 WARNER AVENUE

HUNTINGTON BEACH, CA 92649

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

PROGRAM SUPPORT

FOUNDATION STATUS OF RECIPIENT:

PC

8

10,000. -

RECIPIENT NAME:
THERAPEUTIC RIDING CENTER
OF HUNTINGTON BEACH INC

ADDRESS:
PO BOX 2298
HUNTINGTON BEACH, CA 92647

RELATIONSHIP:
NONE
PURPOSE OF GRANT:
PROGRAM SUPPORT

FOUNDATION STATUS OF RECIPIENT:

RECIPIENT NAME:
HUNTINGTON BEACH EDUCATIONAL
FOUNDATION
ADDRESS:
20451 CRAIMER LANE
HUNTINGTON BEACH, CA 92646
RELATIONSHIP:

NONE
PURPOSE OF GRANT:
ARTS ADVANTAGE PROGRAM
FOUNDATION STATUS OF RECIPIENT:
PC

RECIPIENT NAME:
PROJECT SELF SUFFICIENCY
FOUNDATION
ADDRESS:
18685 MAIN STREET, STE A109
HUNTINGTON BEACH, CA 92648
RELATIONSHIP:
NONE

PURPOSE OF GRANT:
HB SUMMER CAMP & CHILD CARE PROGRAM
FOUNDATION STATUS OF RECIPIENT:
SOUNK

RECIPIENT NAME:

ACADEMY YOUTH SERVICE

ORGANIZATION

ADDRESS:

14401 WILLOW LANE

HUNTINGTON BEACH, CA 92647

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

PROGRAM SUPPORT

FOUNDATION STATUS OF RECIPIENT:

PC

RECIPIENT NAME:

EL VIENTO FOUNDATION

ADDRESS:

PO BOX 3897

HUNTINGTON BEACH, CA 92605-3897

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

PROGRAM SUPPORT

FOUNDATION STATUS OF RECIPIENT:

PC

RECIPIENT NAME:

FRIENDS OF SHIPLEY

NATURE CENTER

ADDRESS:

17851 GOLDENWEST ST

HUNTINGTON BEACH, CA 92647

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

PROGRAM SUPPORT

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 5,000.

RECIPIENT NAME:

COLETTES CHILDREN HOME

INC

ADDRESS:

7372 PRINCE DR, STE 106

HUNTINGTON BEACH, CA 92647

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

PROGRAM SUPPORT

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 43,813.

RECIPIENT NAME:

YMCA OF ORANGE COUNTY

ADDRESS:

13821 NEWPORT AVE, STE 200

TUSTIN, CA 92780

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

PROGRAM SUPPORT

FOUNDATION STATUS OF RECIPIENT:

PC

RECIPIENT NAME:

CHILDRENS BUREAU OF

SOUTHERN CALIF

ADDRESS:

1910 MAGNOLIA AVE

LOS ANGELES, CA 90007

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

GRANT FOR HB SUMMER DAY CAMP

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 5,000.

HINTINGTON BEACH, CA 92647 RELATIONSHIP:

ADDRESS:

NONE
PURPOSE OF GRANT:

RECIPIENT NAME:

SCHOOL BELL PROGRAM

ASSISTANCE LEAGUE OF HUNTINGTON BEACH

8071 SLATER AVE, STE 105

FOUNDATION STATUS OF RECIPIENT:

ЪС

THERESE PLUNKETT FOUNDATION 430767012

FORM 990PF, PART XV, LINE 3a - CONTRIBUTIONS, GIFTS, GRANTS PAID

RECIPIENT NAME:
BOYS & GIRLS CLUBS OF
HUNTINGTON BEACH
ADDRESS:
16582 BROOKHURST
FOUNTAIN VALLEY, CA 92705
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
PROGRAMS OFFERED IN HUNTINGTON BEACH

TOTAL GRANTS PAID:

FOUNDATION STATUS OF RECIPIENT:

STATEMENT 13

188,813.