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Form **990-PF**

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

2014

OMB No 1545-0052

Department of the Treasury Internal Revenue Service

► Do not enter social security numbers on this form as it may be made public. ► Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf.

Open to Public Inspection

<u>-</u>	or cale	noar	year 2014, or tax	x year beginning	<u>L</u>	1/01		, 2014,	and endi	ng o	/ 31		
,	har	١٥٥	p Coddord	. Foundati	ъ Tr	a.t					Α	Employer identification num 75-6005868	ber
Charles B. Goddard Foundation Trust PO Box 1485						В	Telephone number (see inst	ructions)					
	Ardmore, OK 73402							580-226-6040	,				
1 ≿.⊃		,	010 10101										
1											C	If exemption application is	pending, check here
) <u></u>	C he	ck all	that apply	Initial return	[Initia	I return of	a form	er public	charity	D	1 Foreign organizations, chec	k here
E				Final return		Ame	nded retu	rn			-		
(M)			L	Address chan			e change					2 Foreign organizations meets here and attach computation	
F	Che	ck typ	e of organizatio	n X Sec	tion 501	(c)(3)	exempt pr	ıvate fo	undation			nere and attach computatio	" []
>	Γ	Sec	tion 4947(a)(1) r				Other ta	xable p	rıvate fot	undation	E	If private foundation status	
5 T			value of all assets a		J Acc	ounting	method	X C	ash	Accrual	1	under section 507(b)(1)(A)	, check here
٣		n Part I	I, column (c), line 16	5)		Other (s		ш	L	l	F	If the foundation is in a 60-	month termination
2]	▶ \$		8,895,		(Part I,	colum	n (d) mus	t be on	cash bas	sīs)		under section 507(b)(1)(B)	, check here
] ق	Part I		nalysis of Re			(a) [Revenue a	and	(b) Net	ınvestmer	nt	(c) Adjusted net	(d) Disbursements
⊋ ¯		_ E>	penses (The	total of amounts	s in		nses per b			ncome	-	income	for charitable
13		cor	lumns (b), (c), a rily equal the am	ina (a) may not nounts in columi	neces- n (a)	İ						1	purposes (cash basis only)
			ee instructions))		. (0)								(casir basis orny)
_		1	Contributions, gifts, grants										
		2	Ck ► X if the four	ndn is not required to attac	h Sch B								
		3	Interest on savings and ter	moorary cash invostments				166.		1.6	56.	N/A	1
		4	Dividends and interest from				267,			267,95		N/A	
		, ,	Gross rents.	in societies			201,	333.		201,90	<u>) </u>		
			Net rental income or (loss)										
	R	6 a	Net gain or (loss) from sal	le of assets not on line 10		-	2	006.					
	Ε		Gross sales price for		625.	<u> </u>	<u>-</u> /					 	
	V E	7	assets on line 6a Capital gain net inco			·				2,00	06.		
	Ñ	8	Net short-term capita										
	ក្	9	Income modifications	S									
	Ε	10 a	Gross sales less returns and										į
			allowances Less Cost of			 						<u> </u>	<u> </u>
		"	goods sold			<u> </u>							
			Gross profit or (loss) (atta										
		11	Other income (attach					-00	ł				
		1.0		<u>ee Stateme</u>	ent 1	 		<u>580.</u>		4,58			
-		12	Total Add lines	theorigin 11		 	274,	$\frac{711}{000}$.		274,71	<u> L L .</u>	 	4,000.
		14	Other employee sala	aries and wares	ees, etc	├	- 4,	000.					4,000.
	i	1.5		124								 	<u>.</u>
		16a	LEGAT fees (attach st									 	
	A D	Ø b	Accounting fees (att	tach sch)									
	M	G	Other profeses fall	ach scho									
Ç	10 N	17-	Inferest	THE REAL PROPERTY.		<u> </u>			<u> </u>				
Ě	⊋ s E T	18-	Taxes (attach schedule)(s	see instrs) Şee S	Stm 2		4.	393.	 	3,3	75.		
**	RAA	19	Depreciation (attach	1									i
8		200	sch) and depletion							<u>. </u>		 	
	PN V G F	20 21	Occupancy Travel, conferences,	and meetings		<u> </u>			 			 	
1	-A -	22	Printing and publication	-		<u> </u>			 			 	
U	מַ אַנ	23	Other expenses (atta			\vdash		·	 			 	
Ç	E	-		See Stateme	ent 3			320.	1	32	20.		
SCANNED SEPTO 2018	5 5	24	Total operating and		_	1							
2	S		expenses Add lines	s 13 through 23	- ∨ 17			713.		3,69	95.	<u> </u>	4,000.
Ø	•	25	Contributions, gifts, grants		t XV		435,	573.				 	435,573.
H	7	26	Total expenses and Add lines 24 and 25				111	206		2 (0 E		120 572
9 2	<u>-</u>	27	Subtract line 26 from			 	444,	200.	-	3,6	, ,	-	439,573.
			Excess of revenue										
			and disbursements				-169,	575.					
		b	Net investment inco	ome (if negative, ente	er -0-)					271,0	16.		
_		C	Adjusted net income	e (if negative, enter	-0-)							<u> </u>	l

Part	TITLE	Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End o	f year
		(See instructions)	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash — non-interest-bearing	120,505.	75,668.	75,668.
	Ž	Savings and temporary cash investments	1,447,782.	515,450.	515,450.
	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 sch)	,		
ŝ		Less allowance for doubtful accounts			
S S E T	8	Inventories for sale or use			
Ţ	9	Prepaid expenses and deferred charges		,,	
S		Investments – U.S. and state government obligations (attach schedule)			
		no Investments — corporate stock (attach schedule)	4,067,573.	4,866,349.	8,299,340.
		: Investments — corporate bonds (attach schedule)			<u> </u>
	11	Investments — land, buildings, and equipment basis		-	
		Less accumulated depreciation (attach schedule)			
	12	Investments – mortgage loans			
		Investments – other (attach schedule)			
	14	Land, buildings, and equipment basis			
		Less accumulated depreciation (attach schedule)			
		Other assets (describe See Statement 4) Total assets (to be completed by all filers —	1,169.	5,372.	5,372.
	'6	see the instructions. Also, see page 1, item 1)	5,637,029.	5,462,839.	8,895,830.
Ļ	17	Accounts payable and accrued expenses			i
Å	18	Grants payable]
B	19	Deferred revenue			
Ĺ	20	Loans from officers, directors, trustees, & other disqualified persons.			į
I T	21	Mortgages and other notes payable (attach schedule)			<u>'</u>
Ì	22	Other liabilities (describe			!
E S	23	Total liabilities (add lines 17 through 22)	0.	0.	
	-	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.			!
ΝF	24	Unrestricted			
E U T N	25	Temporarily restricted			1
D	26	Permanently restricted			1
A B S A E L T A		Foundations that do not follow SFAS 117, check here. X and complete lines 27 through 31.			
ĔĹ	27	Capital stock, trust principal, or current funds	5,637,029.	5,462,839.	1
SN	28	Paid in or capital surplus, or land, bldg , and equipment fund	, , , , , , , , , , , , , , , , , , , ,	,,	1
O E	29	Retained earnings, accumulated income, endowment, or other funds			1
ŔŚ	30	Total net assets or fund balances (see instructions)	5,637,029.	5,462,839.	1
	31	Total liabilities and net assets/fund balances (see instructions)	5,637,029.	5,462,839.	1
Par	<u> </u> 	Analysis of Changes in Net Assets or Fund Balance		5,402,039.	
		I net assets or fund balances at beginning of year – Part II, colun		ee with	1
•	end-	of-year figure reported on prior year's return)	ini (a), inie so (musi agri	ee with	5,637,029.
2	Ente	r amount from Part I, line 27a		2	-169,575.
3	Other	increases not included in line 2 (itemize)		3	
		lines 1, 2, and 3		4	5,467,454.
		ases not included in line 2 (itemize) See Statement		5	4,615.
6	Tota	net assets or fund balances at end of year (line 4 minus line 5) -	 Part II, column (b), line 	e 30 6	5,462,839.

Part		osses for Tax on Investmen					
•	• (a) List and describe 2-story brick warehouse	the kind(s) of property sold (e.g., ree, or common stock, 200 shares MLC	al estate, C Company)	(b) How acq P — Purcha D — Donat	se	(C) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1 a	.361 Veritiv Corpor	ation		P		8/04/11	7/15/14
b	76 Veritiv Corporat	ion		<u> P</u>		8/04/11	12/10/14
С							
d	······································						
e						41.0	(1)
	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other bas plus expense of sale			(h) Gain or (e) plus (f) m	inus (g)
a	18.			10.			8.
b	3,607.		1	,609.			1,998.
<u> </u>							
d							
e			W. (l.) 10/21/60				<u> </u>
		ng gain in column (h) and owned by (j) Adjusted basis	(k) Excess of column		0.5	(I) Gains (Col In minus column (I	
	(i) Fair Market Value as of 12/31/69	as of 12/31/69	over column (j), if an			n -0-) or Losses (fr	
			· · · · · · · · · · · · · · · · · · ·				
a							8.
<u>b</u>							1,998.
C							
d							-
е			antar in Part Libra 7			<u> </u>	
	Capital gain net income or (net	If (loss), ent	enter in Part I, line 7 der -0- in Part I, line 7		2		2,006.
3	Net short-term capital gain or (loss) as defined in sections 1222(5)	and (6)				
	If gain, also enter in Part I, line in Part I, line 8	e 8, column (c) (see instructions) If	(loss), enter -0-		3		0.
Par	t V Qualification Unde	r Section 4940(e) for Reduce	ed Tax on Net Investn	nent Inc	ome	?	
(For	optional use by domestic private	e foundations subject to the section	4940(a) tax on net investme	ent income)		
	10.10(1)(0)	. A black					
it sec	ction 4940(d)(2) applies, leave the	nis part biank					
Was	the foundation liable for the sec	tion 4942 tax on the distributable an	nount of any year in the bas	se period?		Yes	X No
		lify under section 4940(e) Do not co					
7	Enter the appropriate amount i	n each column for each year, see th	ne instructions before makin	ng any ent	ries		
	(a) Base period years	(b)	(c) Net value of			(d) Distribution	n ratio
	Calendar ýear (or tax year	Adjusted qualifying distributions	noncharitable-use ass	ets	(colu		by column (c))
	beginning in)						
	2013	410,000.		1,802.			0.047720
	2012	407,100.		7,759.			0.054152
	2011	464,711.		4,247.			0.064956
	2010	312,321.		2,182.			0.043365
	2009	344,762.	6,183	3,407.			0.055756
2	Total of line 1, column (d)				2		0.265949
3	Average distribution ratio for th	ne 5-year base period – divide the to	otal on line 2 by 5, or by the	.			•
•	number of years the foundation	n has been in existence if less than	5 years		3	ļ	0.053190
4	Enter the net value of nonchar	itable-use assets for 2014 from Part	X, line 5		4		<u>9,067,471.</u>
					_		
5	Multiply line 4 by line 3				5		482,299.
6	Enter 1% of net investment inc	come (1% of Part I, line 27b).			6	}	2,710.
7	Add lines 5 and 6				7	ļ	485,009.
8	Enter qualifying distributions fr	om Part XII, line 4		:	8	<u> </u>	439,573.
	If line 8 is equal to or greater t Part VI instructions	han line 7, check the box in Part VI	, line 1b, and complete that	part using	g a 1	% tax rate See	the

	75-600 / Charles B. Goddard Foundation Trust			P	age 4
Par		ructions)		
1 a	Exempt operating foundations described in section 4940(d)(2), check here		-		
	Date of ruling or determination letter (attach copy of letter if necessary — see instrs)				
þ	Domestic foundations that meet the section 4940(e) requirements in Part V,			5,4	120.
	check here and enter 1% of Part I, line 27b				
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, column (b)	ŀ			
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable				
	foundations only Others enter -0-)	: 1			<u> 0 . </u>
3	Add lines 1 and 2			5,4	120.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	<u> </u>			0.
5	Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-	<u>: </u>		5,4	<u> 120.</u>
6	Credits/Payments				
а	2014 estimated tax pmts and 2013 overpayment credited to 2014 6 a 5, 372.				1
b	Exempt foreign organizations — tax withheld at source 6 b				1
С	Tax paid with application for extension of time to file (Form 8868)				1
d	Backup withholding erroneously withheld 6 d	. .			
7	Total credits and payments Add lines 6a through 6d	<i>i</i> [5,3	372.
8	Enter any penalty for underpayment of estimated tax. Check here If Form 2220 is attached	}			
9	Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed	,			48.
10	Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.	$\overline{}$			
11	Enter the amount of line 10 to be Credited to 2015 estimated tax				
Par	t VII-A Statements Regarding Activities				
1 a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it			Yes	No
	participate or intervene in any political campaign?		1 a		X
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes				
	(see Instructions for the definition)?		1 b		X
	If the answer is 'Yes' to 1a or 1b , attach a detailed description of the activities and copies of any materials publish or distributed by the foundation in connection with the activities	ed	_		
	Did the foundation file Form 1120-POL for this year?		1 c		X
C	I Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ►\$ (2) On foundation managers ►\$	0			
	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on	0.			
	foundation managers ►\$ 0.				1
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?		2	-	X
	If 'Yes,' attach a detailed description of the activities				
2	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles				
3	of incorporation, or bylaws, or other similar instruments? If 'Yes,' attach a conformed copy of the changes		3		$\bar{\mathbf{x}}$
4 a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?		4 a	Х	
	o If 'Yes,' has it filed a tax return on Form 990-T for this year?	i	4 b	Х	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?		5		Х
	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				1 +
	By language in the governing instrument, or				
	By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict	t			
	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, column (c), and Part XV		7	X	
8 a	Enter the states to which the foundation reports or with which it is registered (see instructions)				
	OK				
t	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 <i>General Instruction G</i> ? <i>If 'No,' attach explanation</i>		8 b	- <u>X</u>	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942 for calendar year 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)? If 'Yes,' complete Pair	!(j)(5) rt XIV	9		X
10	Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their name	es			
	and addresses		10		X
BAA		Fo	rm 99	0-PF ((2014)

		(2014) Charles B. Goddard Foundation Trust	75-600	5868	1	Page 5
Par	t VII-A	Statements Regarding Activities (continued)				
11	At any within	time during the year, did the foundation, directly or indirectly, own a controlled entity the meaning of section 512(b)(13)? If 'Yes', attach schedule (see instructions)		11	<u> </u>	Х
12		e foundation make a distribution to a donor advised fund over which the foundation or a disqualific ry privileges? If 'Yes,' attach statement (see instructions)	ied person had	12		x
13	Did the	e foundation comply with the public inspection requirements for its annual returns and exemption	application?	13	X	
		te address. • N/A			===	
14		boks are in care of The Foundation Telephore of PO Box 1485 Ardmore OK ZIP + 4		<u>0-226-6</u>	040	
15		ed at PO_Box_1485 Ardmore_OKZIP + 4 ¹ n 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — Check here	<u>73402</u>	· Ŋ7	<u>-</u>	
		nter the amount of tax-exempt interest received or accrued during the year	► 15			N/A
16	At any bank,	time during calendar year 2014, did the foundation have an interest in or a signature or other ais securities, or other financial account in a foreign country?	uthority over a	16	Yes	No X
		ne instructions for exceptions and filing requirements for FinCEN Form 114, (formerly TD F 90-22 the name of the foreign country $ ightharpoonup$	1) If 'Yes,'			
Pai	rt VII-E					
		orm 4720 if any item is checked in the 'Yes' column, unless an exception applies.			Yes	No
1 8		the year did the foundation (either directly or indirectly) ngage in the sale or exchange, or leasing of property with a disqualified person?	Yes X	No		Ì
	(2) B	prrow money from, lend money to, or otherwise extend credit to (or accept it from) a				
		squalified person? urnish goods, services, or facilities to (or accept them from) a disqualified person?		No No		1
		ay compensation to, or pay or reimburse the expenses of, a disqualified person?	H H	No		
	(5) Tı	ansfer any income or assets to a disqualified person (or make any of either available r the benefit or use of a disqualified person)?	Yes X	No		
	(6) A	gree to pay money or property to a government official? (Exception. Check 'No' if the undation agreed to make a grant to or to employ the official for a period after termination government service, if terminating within 90 days.)	Yes X	No		
ı		answer is 'Yes' to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in ations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see instructions)	,7	11	 b	X
	Orgar	nizations relying on a current notice regarding disaster assistance check here	▶			
	c Did th that w	e foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, vere not corrected before the first day of the tax year beginning in 2014?		1	c	X
2		on failure to distribute income (section 4942) (does not apply for years the foundation was a e operating foundation defined in section 4942(j)(3) or 4942(j)(5))				
i	a At the and 6	end of tax year 2014, did the foundation have any undistributed income (lines 6d e, Part XIII) for tax year(s) beginning before 2014?	Yes X	No		
	If 'Ye	s,' list the years 20 , 20 , 20 , 20				
	(relati	nere any years listed in 2a for which the foundation is not applying the provisions of section 4942 ng to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942)	(a)(2) (a)(2) to],	
	_	ars listed, answer 'No' and attach statement – see instructions) provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years l	nere	2	D 1	AVE
,		, 20, 20, 20	icic			
3		e foundation hold more than a 2% direct or indirect interest in any business	_			
		orise at any time during the year?	Yes X	No		
	or dis by the	s,' did it have excess business holdings in 2014 as a result of (1) any purchase by the foundation qualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approve commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or a lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to mine if the foundation had excess business holdings in 2014)	ed	3	h	N/A
_				 '	-	TA TA
4		ne foundation invest during the year any amount in a manner that would jeopardize its able purposes?		4	a	X
	јеора	ne foundation make any investment in a prior year (but after December 31, 1969) that could rdize its charitable purpose that had not been removed from jeopardy before the first day of ix year beginning in 2014?		4	 b	$\overline{\mathbf{x}}$

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Part VII-B Statements Regarding Activities		n 4/20 May Be Red	uirea (continued)		
5 a During the year did the foundation pay or incur(1) Carry on propaganda, or otherwise attempt	•	(section 4945(e))?	Yes X	No	
(2) Influence the outcome of any specific publi on, directly or indirectly, any voter registral	No				
(3) Provide a grant to an individual for travel, s	No				
(4) Provide a grant to an organization other th in section 4945(d)(4)(A)? (see instructions)	an a charitable, etc, org	ganization described	Yes X	No	
(5) Provide for any purpose other than religiou educational purposes, or for the prevention	is, charitable, scientific, n of cruelty to children o	literary, or or animals?	Yes X	No	
b If any answer is 'Yes' to 5a(1)-(5), did any of the described in Regulations section 53 4945 or in (see instructions)?	ne transactions fail to qua a current notice regardi	ualify under the exception ing disaster assistance	ons	5 b	N/A
Organizations relying on a current notice regar	ding disaster assistance	e check here	▶ []		
c If the answer is 'Yes' to question 5a(4), does the tax because it maintained expenditure response	ibility for the grant?		N/A Yes	No	
If 'Yes,' attach the statement required by Regu	lations section 53 4945	-5(d)			
 6 a Did the foundation, during the year, receive an on a personal benefit contract? b Did the foundation, during the year, pay premit 			∐ Yes X	No 6 b	V
If 'Yes' to 6b, file Form 8870	urns, directly or indirect	iy, on a personal benen	it contract?	60	X
7 a At any time during the tax year, was the found	ation a party to a prohit	oited tax shelter transac	tion? Yes X	No	
b If 'Yes,' did the foundation receive any proceed	ds or have any net incor	me attributable to the tr	ansaction? N	/A 7b	
Part VIII Information About Officers, Dire	ectors, Trustees, Fo	oundation Managers	s, Highly Paid Emplo	yees,	
and Contractors					
1 List all officers, directors, trustees, foundation		T		(a) Evpops	o account
(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) Expens other a	llowances
William R. Goddard Jr	Trustee	1,000.	0.		0
PO Box 1485	0.01				
Ardmore, OK 73402		1 000			0
Katherine E. Dodd	Trustee	1,000.	0.		0
1907 Riverside Norman, OK 73072	0.01				
Jennifer M. Goddard-Garcia	Trustee	1,000.	0.		0
1115 W. 7th Street #106	0.01	1,000.			v
Austin, TX 78735	0.01				
Garland Clay	Trustee	1,000.	0.		0
4716 Harvey Road	0.01	_,			
Ardmore, OK 73401					
2 Compensation of five highest-paid employees	(other than those inclu	ıded on line 1 – see ins	structions). If none, ente	r '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) Expens other a	se account, illowances
None					
		 			
	 				
					
	1				
	1				
Total number of other employees paid over \$50,000	<u> </u>		<u> </u>		C

Part	VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Emploand Contractors (continued)	
3 6	ive highest-paid independent contractors for professional services (see instructions). If none, enter 'NONE.'	
_ _	(a) Name and address of each person paid more than \$50,000 (b) Type of service	(c) Compensation
None		(4)
222		
Total r	number of others receiving over \$50,000 for professional services	0
Part	IX-A Summary of Direct Charitable Activities	
List the	foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of tions and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
	N/A	
' -	N/A	
-		
2		, ,
3 .		
4		-
•		
Part	IX-B Summary of Program-Related Investments (see instructions)	
Descr	ibe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1		
	N/A	
2 -		
•		
•		
All ot	ner program-related investments. See instructions	
3		
Total	Add lines 1 through 3	0.
BAA	,	Form 990-PF (2014)

Form 990-PF (2014) Charles B. Goddard Foundation Trust 75	-600	5868 Page 8
Part X Minimum Investment Return (All domestic foundations must complete this part. F 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	1 a	8,135,944.
b Average of monthly cash balances	1 b	1,069,610.
c Fair market value of all other assets (see instructions)	1 c	
d Total (add lines 1a, b, and c)	1 d	9,205,554.
e Reduction claimed for blockage or other factors reported on lines 1a and 1c		
(attach detailed explanation) 1 e 0.		
2 Acquisition indebtedness applicable to line 1 assets	2	0.
3 Subtract line 2 from line 1d	3	9,205,554.
4 Cash deemed held for charitable activities Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	138,083.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	9,067,471.
6 Minimum investment return. Enter 5% of line 5	6	453,374.
Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private oper and certain foreign organizations check here ► and do not complete this part.)	ating	foundations
1 Minimum investment return from Part X, line 6.	1	453,374.
2a Tax on investment income for 2014 from Part VI, line 5 2a 5, 420.		
b Income tax for 2014 (This does not include the tax from Part VI) 2 b	1	
c Add lines 2a and 2b.	2 c	5,420.
3 Distributable amount before adjustments Subtract line 2c from line 1	3	447,954.
4 Recoveries of amounts treated as qualifying distributions	4	
5 Add lines 3 and 4	5	447,954.
6 Deduction from distributable amount (see instructions).	6	
7 Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	447,954.
Part XII Qualifying Distributions (see instructions)		
 Amounts paid (including administrative expenses) to accomplish charitable, etc, purposes Expenses, contributions, gifts, etc – total from Part I, column (d), line 26 	1 a	439,573.
b Program-related investments — total from Part IX-B	1 b	
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)		
b Cash distribution test (attach the required schedule)	3 b	
A Qualifying distributions Add lines 1s through 3b. Enter here and on Part V. line 8, and Part XIII. line 4	4	//39 573

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

Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions)

BAA

6 Adjusted qualifying distributions. Subtract line 5 from line 4

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439,573.

5

6

Part XIII Undistributed Income (see instructions)

e Remaining amount distributed out of corpus 5 Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a)) 6 Enter the net total of each column as indicated below: a Corpus Add lines 3f, 4c, and 4e Subtract line 5 b Prior years' undistributed income Subtract line 4b from line 2b c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed d Subtract line 6c from line 6b Taxable amount — see instructions e Undistributed income for 2013 Subtract line 4a from line 2a Tarable amount — see instructions f Undistributed income for 2014 Subtract lines 4d and 5 from line 1 This amount must be		(a) Corpus	(b) Years prior to 2013	(c) 2013	(d) 2014
2 Undistributed more, if any, as of the end of 2014 a Enter amount for 2013 only b Total for prior years 20 20 20					447 054
b Tital for prior years 20	*****				447,334.
b Total for prior years 20 _ 20 _ , 20 _ , 20 _ 3 _ 3 _ 20 _ 20				97,610.	
a From 2010 b From 2010 c From 2011 d From 2013 1 Total of lines 3a through e 4 Qualifying distributions for 2014 from Part XII, line 4 P \$ 439,573. a Applied to 2013, but not more than line 2a b Applied to undistributed income of prior years (Election required — see instructions) c Treated as distributions out of corpus (Election required — see instructions) d Applied to 2014 distributable amount e Remaining amount distributed out of corpus 5 Excess distributions carryear spelled to 2014 (If an amount appears in column (d), the same amount miss the shown in column (a)) 6 Enter the net total of each column as indicated below: a Corpus Add lines 31, 4c, and 4e Subtract line 5 b Prior years' undistributed income Subtract line 4b from line 2b 1 Enter the net total of each column as indicated below: a Corpus Add lines 31, 4c, and 4e Subtract line 5 b Prior years' undistributed income Subtract line 4b from line 2b 2 Enter the amount of prior years' undistributed moorne for which a notice of deficiently has been insued, or on which the section 4942(2) tax has been previously assessed 2 Undistributed income for 2013 Subtract line 4a from line 2a Tarable amount — see instructions 4 Undistributed income for 2014 Subtract lines 4d and 5 from line 1 This amount must be distribution and of corpus to satisfy requirements imposed by distributed in 2015 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by distributed in 2015 8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions) 9 Excess distributions carryover from 2009 not applied on line 5 and 8 from line 6 and 1			0.		
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c From 2011 d From 2012 e From 2013 f Total of lines 3a through e Qualifying distributions for 2014 from Part XII, line 4 * \$ 439,573. a Applied to 2013, but not more than line 2a b Applied to 2013, but not more than line 2a b Applied to Undistributed income of prior years (Election required — see instructions) c Treated as distributions out of corpus (Election required — see instructions) d Applied to 2014 distributable amount e Remaining amount distributed out of corpus Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount miss the shown in column (a)) 6 Enter the net total of each column as indicated below: a Corpus Add line 31, 4c, and 4e Subtract line 5 b Prior years' undistributed income Subtract line 4b from line 2b Town line 1c Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015 A Mounts treated as distributions out of corpus to salisty requirements imposed by section 1700(I)(F) or 442(2)(3) (Election may be required — see instructions) 6 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions) 6 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6					
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XII, line 4	<u> </u>	<u></u>			
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amount — see instructions e Undistributed income for 2013 Subtract line 4a from line 2a Tavable amount — see instructions f Undistributed income for 2014 Subtract lines 4d and 5 from line 1. This amount must be distributed in 2015 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required — see instructions) Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions) Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a O.	tax has been previously assessed		0.		
e Undistributed income for 2013 Subtract line 4a from line 2a Tavable amount — see instructions f Undistributed income for 2014 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required — see instructions) 8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions) 9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a 0.					
Inne 2a Tavable amount — see instructions 1 Undistributed income for 2014 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015 2 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) 2 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions) 3 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a 4 Undistributed income for 2014 Subtract lines 4 and 5 from line 5 or line 5 or line 5 or line 6 or line 5 or line 7 (see instructions)	amount — see instructions		U.		
f Undistributed income for 2014 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required — see instructions) 8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions) 9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a 0.				n	
4d and 5 from line 1 This amount must be distributed in 2015 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required — see instructions) 8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions) 9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a 0.	Into Zu Tu abro anount occomotostos				
distributed in 2015 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required — see instructions) 8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions) 9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a 0.					
corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required — see instructions) 8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions) 9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a 0.					105,991.
section 170(b)(1)(F) or 4942(g)(3) (Election may be required — see instructions) 8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions) 9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a 0.					
may be required — see instructions) 8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions) 9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a 0.					
applied on line 5 or line 7 (see instructions) 9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a 0.	may be required - see instructions)	0.			
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a 0.	8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions)	n			
Subtract lines 7 and 8 from line 6a 0.	9 Excess distributions carryover to 2015.			· · · · · · · · · · · · · · · · · · ·	
tu Analysis of line 9	Subtract lines 7 and 8 from line 6a	0.			
3 Evenes from 2010	•				
a Excess from 2010 b Excess from 2011		-			
c Excess from 2012		-			
d Excess from 2013		†]		
e Excess from 2014		1]	İ	

Form 990-PF (2014) Charles B. Godda				75-600586	
Part XIV Private Operating Founda					N/A
1a If the foundation has received a ruling or d is effective for 2014, enter the date of the i	etermination letter t	that it is a private o	pperating foundation,	and the ruling	
b Check box to indicate whether the foundation	-	rating foundation de	escribed in section	4942(j)(3) or	4942(j)(5)
2a Enter the lesser of the adjusted net	Tax year	1	Prior 3 years		
income from Part I or the minimum investment return from Part X for	(a) 2014	(b) 2013	(c) 2012	(d) 2011	(e) Total
each year listed	, , , , , , , , , , , , , , , , , , , ,				
b 85% of line 2a					
 Qualifying distributions from Part XII, line 4 for each year listed 		<u></u>			
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c				_	
3 Complete 3a, b, or c for the alternative test relied upon					
a 'Assets' alternative test — enter					
(1) Value of all assets	ļ. <u> </u>	ļ			
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b 'Endowment' alternative test — enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c 'Support' alternative test - enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(III)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					
Part XV Supplementary Information	(Complete this	s part only if th	e foundation ha	d \$5,000 or mo	re in
assets at any time during the	nė year – see ir	nstructions.)			
Information Regarding Foundation Manage a List any managers of the foundation who he close of any tax year (but only if they have None	ers: nave contributed mo e contributed more t	ore than 2% of the than \$5,000) (See	total contributions re- section 507(d)(2))	ceived by the found	ation before the
b List any managers of the foundation who compared to the foundation which we can be compared to the foundation which we can be compared to the foundation which we can be compared to the foundation which we can be compared to the foundation which we can be compared to the foundation which we can be compared to the foundation which we can be compared to the foundation of the foundation which we can be compared to the foundation of the foundation which we can be compared to the foundation of the foundation which we can be compared to the foundation of the foundation which we can be compared to the foundation of the foundation	own 10% or more of	f the stock of a corr	noration (or an equal	ly large portion of th	ne ownership of
a partnership or other entity) of which the	foundation has a 10	0% or greater intere	est	ly large portion or a	ic officers in pro-
2 Information Regarding Contribution, Gran	t. Gift. Loan, Schol	arship, etc. Prograv	ms:		
Check here In the foundation only requests for funds. If the foundation make complete items 2a, b, c, and d	nakes contributions	to preselected cha	arıtable organizations		
a The name, address, and telephone number	er or e-mail address	of the person to w	vhom applications sh	ould be addressed	
See Statement 6					
b The form in which applications should be	submitted and inform	mation and materia	als they should includ	е	
See Statement for Line 2a					
c Any submission deadlines		 		 	
See Statement for Line 2a			 		
d Any restrictions or limitations on awards, s	such as by geograp	hical areas, charita	able fields, kinds of ir	stitutions, or other:	actors
See Statement for Line 2a					
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Part XV | Supplementary Information (continued) 3 Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, show any relationship to any foundation manager or substantial contributor Foundation Purpose of grant or contribution Recipient status of recipient Amount Name and address (home or business) a Paid during the year See Statement 7 435,573. ► 3a b Approved for future payment 3 b **Total**

Page 11

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated b	usiness income	Excluded by s	ection 512, 513, or 514	(e)	
Program service revenue	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	Related or exempt function income (See instructions)	
a			ļ		_ 	
b			<u> </u>			
c						
d			 			
e			 			
q Fees and contracts from government agence	05		 			
2 Membership dues and assessments	⁵³			_		
3 Interest on savings and temporary cash investments			14	166.		
4 Dividends and interest from securities			14	267,959.	<u> </u>	
5 Net rental income or (loss) from real estate				201, 333.		
a Debt-financed property		· ·				
b Not debt-financed property						
6 Net rental income or (loss) from personal property			 			
7 Other investment income	211110	4,580.				
8 Gain or (loss) from sales of assets other than inventory			18	2,006.		
9 Net income or (loss) from special events				· · · · · · · · · · · · · · · · · · ·		
10 Gross profit or (loss) from sales of inventory						
11 Other revenue						
a						
b						
С						
d			<u> </u>			
e		 				
12 Subtotal Add columns (b), (d), and (e)		4,580.		270,131.		
13 Total. Add line 12, columns (b), (d), and (e	•			13	274,711	
(See worksheet in line 13 instructions to verify cal	culations)					

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions)
N/A	

orm 990-Pi					ion Trust			75-6005		Pa	ge 13
Part XVII	Information Rega		ısfers	To and Ti	ransactions a	and Rel	ationships W	ith Noncharitab	le		
	Exempt Organiz	zations									
1 Did*the	e organization directly	or indirectly e	annana	in any of th	ne following with	any oth	er organization			Yes	No
descril	bed in section 501(c) o g to political organizati	of the Code (c	other tha	an section 5	501(c)(3) organi	zations)	or in section 52	7,			
a Transf	ers from the reporting	foundation to	a nonc	charitable e	xempt organiza	tion of.					
(1) Ca	ash								1 a (1)		X
(2) Ot	her assets							:	1 a (2)		X
b Other	transactions										1
(' /	ales of assets to a non-		•	•					1 b (1)		<u>X</u>
\ _/	urchases of assets fror				nization				1 b (2)		X
\- /	ental of facilities, equip		er asset	ts					1 b (3)	 	X
	eimbursement arrangei								1 b (4)		X
\- /	ans or loan guarantee		h						1 b (5)		X
V-7	erformance of services		-	_					1 b (6)		X
c Snarin	ng of facilities, equipme	ent, mailing ii	SIS, OUI	ier assets, t	ог раш етпрюуч	:62			1 c		^_
d If the a	answer to any of the a oods, other assets, or s ansaction or sharing ai	bove is 'Yes, services giver rrangement.	complete by the show in	ete the follo reporting f	owing schedule foundation If the the value of the second contraction is the second contraction.	Column e founda e goods,	(b) should alwa tion received les other assets, o	ys show the fair ma ss than fair market r services received	arket value value in	e of	
(a) Line no	(b) Amount involved				pt organization			sfers, transactions, and	sharing arrar	ngement	:S
N/A	, ,										
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descr	foundation directly or ibed in section 501(c)	of the Code (liated wo	rith, or relat	ed to, one or m 501(c)(3)) or in	ore tax-e section 5	exempt organiza 527?	itions	Ye	s X]No
DII TES	s,' complete the follow			(h) Type	of organization		10) Description of rela	ationship		
N/A	(a) Name of Organizati	1011		(b) 1ypc	or organization	<u>.</u>) Boson Buon or row	21.07.01.11		
N/A											
						·	1	······································			
								_			
Unde	er penalties of perjury, I declare ect, and complete Declaration	that I have examin	ned thus rel	turn, including a	ccompanying schedul	es and state	ments, and to the best	of my knowledge and believed	ef, it is true,		
Sign Com	ect, and complete Declaration	n of preparer (off	ier vian ta	axpayer) is bas	1 \$/26/15		Trustee	wieuge	May the this retu prepare	irn with	the below
<u> </u>	ignature of officer of rustee				Date		itle		_ (see ins	truction:	s)? No
	Print/Type preparer's na	ame //		Preparer's	signature		Date	Check if	PTIN	1.55	1 1
Paid	WARTER			Self-1	Prepared			self-employed		17. P.	C oxing
Paid Preparer				_	r repared	SAC BUYE		r ' 			النظامية. المراجع
Use Only								B-3 79067467482	AND DESCRIPTION OF THE PERSON	THE PERSON NAMED IN	

Phone no

Form 990-PF (2014)

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2014	Federal Statements	Page 1				
	Charles B. Goddard Foundation Trust					
Statement 1 Form 990-PF, Part I, Line 11 Other Income						
Other Investment Income	(a) (b) Net Revenue Investment per Books Income \$ 4,580. \$ 4,580. Total \$ 4,580. \$ 4,580.	(c) Adjusted Net Income				
Statement 2 Form 990-PF, Part I, Line 18 Taxes		.				
Federal Excise Tax Foreign Tax Paid	(a) (b) Net (c) Expenses Investment Adjusted per Books Income Net Income \$ 1,018.	(d) Charitable Purposes \$ 0.				
Statement 3 Form 990-PF, Part I, Line 23 Other Expenses						
Accounting Fees ADR Fee	(a) (b) Net (c) Expenses per Books Investment Income Adjusted Net Income \$ 70. \$ 70. 250. 250. Total \$ 320. \$ 320.	(d) Charitable Purposes \$ 0.				
Statement 4 Form 990-PF, Part II, Line 15 Other Assets						
Prepaid Income Taxes		Fair Market Value 5,372. 5,372.				

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2014

Federal Statements

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Charles B. Goddard Foundation Trust

75-6005868

Statement 5 Form 990-PF, Part III, Line 5 **Other Decreases**

Prior Period Adjustments

Total \$

Statement 6 Form 990-PF, Part XV, Line 2a-d **Application Submission Information**

Name of Grant Program:

William R. Goddard, Jr

Name: Care Of:

PO Box 1485

Street Address: City, State, Zip Code:

Ardmore, OK 73402

Telephone:

580-226-6040

E-Mail Address:

Form and Content:

Letter of Request

Submission Deadlines:

None

Restrictions on Awards:

Preference Given to Entities in South Central Oklahoma and

North Texas.

Statement 7 Form 990-PF, Part XV, Line 3a Recipient Paid During the Year

Name and Address	Donee Relationship	Found- ation Status	Purpose of Grant	 Amount
MD Anderson Cancer Center PO Box 301439 Houston, TX 77230		PC	Operations	\$ 50,000.
Big Brothers Big Sisters of Oklahoma 5840 S Mermorial Dr., Suite 105 Tulsa, OK 74145		PC	Operational	15,000.
The Reading Room Inc 1717 Winchester Ardmore, OK 73401		PC	Operations	40,000.
Regional Food Bank of Oklahoma 3355 S. Purdue Oklahoma City, OK 73137		PC	Operational	50,000.
Goddard Youth Camp 2964 Goddard Youth Camp Rd Sulphur, OK 73086		PC	Operational	30,000.

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Charles B. Goddard Foundation Trust

75-6005868

Statement 7 (continued) Form 990-PF, Part XV, Line 3a Recipient Paid During the Year

Name and Address	Donee Relationship	Found- ation Status	Purpose of Grant	<i></i>	Amount
Salvation Army 123 A Street Southwest Ardmore, OK 73401	_	PC	Operational	\$	5,000.
South Central Oklahoma FCA PO Box 2594 Ardmore, OK 73402		PC	Operational		5,000.
Family Shelter of Southern Oklahoma PO Box 1408 Ardmore, OK 73402		PC	Operational		10,000.
SpiritHorse Therapeutic Center 1960 Post Oak Drive Corinth, TX 76210		PC	Operational		10,000.
A Chance to Change Foundation 5228 Classen Circle Oklahoma City, OK 73118		PC	Operations		10,000.
Cities in Schools 10 West Main, Suite 313 Ardmore, OK 73401		PC	Operations		23,073.
Arbuckle Area Council Boy Scouts 411 St. Hwy. 142 West Ardmore, OK 73401		PC	Operations		17,500.
Bethesda, Inc. 1181 East Main Norman, OK 73071		PC	Operations		10,000.
Ardmore Family YMCA 950 15th Avenue NW Ardmore, OK 73401		PC	Building Fund		125,000.
Gloria Ainsworth Child Care 502 G Street Northeast Ardmore, OK 73401		PC	Operations		5,000.
Sunshine Industries 500 Park Ardmore, OK 73401		PC	Operations		25,000.
Chickasaw Regional Library System 601 Railway Express Ardmore, OK 73401		PC	Summer Reading Program		5,000.
			Tot	al \$	435,573.