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Form

990-PF

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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

OMB No 1545-0052

2015

Open to Public Inspection

For calendar year 2015, or tax year beginning 01-01-2015, and ending 12-31-2015

Name of foundation ROY AND IDA EAGLE FOUNDATION		A Employer identification number 26-2505029	
Number and street (or P O box number if mail is not delivered to street address) PO BOX 2210		B Telephone number (see instructions) (805) 741-7770	
City or town, state or province, country, and ZIP or foreign postal code LOMPOC, CA 93438		C If exemption application is pending, check here <input type="checkbox"/>	
G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input checked="" type="checkbox"/> Address change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change <input type="checkbox"/>		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 15,261,650		J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)	

Part I Analysis of Revenue and Expenses <i>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))</i>		Revenue and expenses per (a) books	Net investment (b) income	Adjusted net (c) income	Disbursements for charitable purposes (d) (cash basis only)
Revenue	1	Contributions, gifts, grants, etc , received (attach schedule)			
	2	Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B			
	3	Interest on savings and temporary cash investments	36	36	
	4	Dividends and interest from securities	343,097	343,097	
	5a	Gross rents			
	b	Net rental income or (loss) _____			
	6a	Net gain or (loss) from sale of assets not on line 10	1,024,335		
	b	Gross sales price for all assets on line 6a 6,641,202			
	7	Capital gain net income (from Part IV, line 2) . . .		1,024,335	
	8	Net short-term capital gain			
	9	Income modifications			
	10a	Gross sales less returns and allowances			
Operating and Administrative Expenses	b	Less Cost of goods sold			
	c	Gross profit or (loss) (attach schedule)			
	11	Other income (attach schedule)			
	12	Total.Add lines 1 through 11	1,367,468	1,367,468	
	13	Compensation of officers, directors, trustees, etc	164,555	47,845	116,710
	14	Other employee salaries and wages			
	15	Pension plans, employee benefits			
	16a	Legal fees (attach schedule).	330	165	165
	b	Accounting fees (attach schedule).	11,781	5,891	5,890
	c	Other professional fees (attach schedule)	169,365	169,365	0
	17	Interest			
	18	Taxes (attach schedule) (see instructions) . . .	38,800	11,074	6,565
	19	Depreciation (attach schedule) and depletion . . .	5,531	1,106	
	20	Occupancy	5,537	1,107	4,430
	21	Travel, conferences, and meetings.	357	179	178
	22	Printing and publications			
	23	Other expenses (attach schedule).	8,431	3,969	4,462
	24	Total operating and administrative expenses. Add lines 13 through 23	404,687	240,701	138,400
	25	Contributions, gifts, grants paid	566,000		566,000
	26	Total expenses and disbursements.Add lines 24 and 25	970,687	240,701	704,400
	27	Subtract line 26 from line 12			
	a	Excess of revenue over expenses and disbursements	396,781		
	b	Net investment income (if negative, enter -0-)		1,126,767	
	c	Adjusted net income(if negative, enter -0-) . . .			

Part II		Balance Sheets	Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing				
	2	Savings and temporary cash investments	465,028	465,457	465,457	
	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 ▶ _____				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments—U S and state government obligations (attach schedule)				
	b	Investments—corporate stock (attach schedule)	8,240,401	8,505,447	10,051,535	
	c	Investments—corporate bonds (attach schedule)	4,584,069	4,511,702	4,444,658	
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____				
	12	Investments—mortgage loans.				
	13	Investments—other (attach schedule)				
	14	Land, buildings, and equipment basis ▶ _____ 299,991 Less accumulated depreciation (attach schedule) ▶ 5,723	90,595	294,268	300,000	
15	Other assets (describe ▶ _____)					
16	Total assets(to be completed by all filers—see the instructions Also, see page 1, item I)	13,380,093	13,776,874	15,261,650		
Liabilities	17	Accounts payable and accrued expenses				
	18	Grants payable				
	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable (attach schedule).				
	22	Other liabilities (describe ▶ _____)				
	23	Total liabilities(add lines 17 through 22)	0	0		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.					
	24	Unrestricted				
	25	Temporarily restricted				
	26	Permanently restricted				
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.					
	27	Capital stock, trust principal, or current funds	13,380,093	13,776,874		
	28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0		
	29	Retained earnings, accumulated income, endowment, or other funds	0	0		
	30	Total net assets or fund balances(see instructions)	13,380,093	13,776,874		
31	Total liabilities and net assets/fund balances(see instructions)	13,380,093	13,776,874			

Part III Analysis of Changes in Net Assets or Fund Balances			
1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year’s return)	1	13,380,093
2	Enter amount from Part I, line 27a	2	396,781
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	13,776,874
5	Decreases not included in line 2 (itemize) ▶ _____	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	13,776,874

Part IV

Capital Gains and Losses for Tax on Investment Income

List and describe the kind(s) of property sold (e g , real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co)		How acquired P—Purchase (b) D—Donation	Date acquired (c) (mo , day, yr)	Date sold (d) (mo , day, yr)
1 a	WELLS FARGO	P	2014-01-01	2015-12-31
b	SALE OF PROPERTY	P	2012-05-07	2015-12-31
c				
d				
e				

(e) Gross sales price	Depreciation allowed (f) (or allowable)	Cost or other basis (g) plus expense of sale	Gain or (loss) (h) (e) plus (f) minus (g)
a 6,448,302		5,518,897	929,405
b 192,900		97,970	94,930
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			Gains (Col (h) gain minus col (k), but not less than -0-) or (l) Losses (from col (h))
(i) F M V as of 12/31/69	Adjusted basis (j) as of 12/31/69	Excess of col (i) (k) over col (j), if any	
a			929,405
b			94,930
c			
d			
e			

2	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	1,024,335
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8	}	3	

Part V

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

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)
If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No
If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2014	869,797	16,042,825	0 054217
2013	773,881	15,089,973	0 051284
2012	837,981	14,059,683	0 059602
2011	524,699	14,085,369	0 037251
2010	850,720	13,414,076	0 063420

2	Total of line 1, column (d).	2	0 265774
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0 053155
4	Enter the net value of noncharitable-use assets for 2015 from Part X, line 5.	4	15,632,349
5	Multiply line 4 by line 3.	5	830,938
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	11,268
7	Add lines 5 and 6.	7	842,206
8	Enter qualifying distributions from Part XII, line 4.	8	704,400

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

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

1a

Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1
Date of ruling or determination letter _____
(attach copy of letter if necessary—see instructions)

b

Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ 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, col. (b)

2

Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)

2

0

3

Add lines 1 and 2.

3

22,535

4

Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)

4

0

5

Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-

5

22,535

6

Credits/Payments

a

2015 estimated tax payments and 2014 overpayment credited to 2015

6a

21,000

b

Exempt foreign organizations—tax withheld at source

6b

c

Tax paid with application for extension of time to file (Form 8868).

6c

2,000

d

Backup withholding erroneously withheld

6d

7

Total credits and payments. Add lines 6a through 6d.

7

23,000

8

Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached

8

9

Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed

9

10

Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.

10

465

11

Enter the amount of line 10 to be Credited to 2015 estimated tax 465 Refunded

11

0

Part VII-AStatements Regarding Activities

1a

During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?

1a

No

b

Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)?
If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.

1b

No

c

Did the foundation file Form 1120-POL for this year?

1c

No

d

Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year
(1) On the foundation \$ 0 (2) On foundation managers \$ 0

e

Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ 0

2

Has the foundation engaged in any activities that have not previously been reported to the IRS?
If "Yes," attach a detailed description of the activities.

2

No

3

Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes

3

No

4a

Did the foundation have unrelated business gross income of \$1,000 or more during the year?

4a

No

b

If "Yes," has it filed a tax return on Form 990-T for this year?

4b

5

Was there a liquidation, termination, dissolution, or substantial contraction during the year?
If "Yes," attach the statement required by General Instruction T.

5

No

6

Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either
• By language in the governing instrument, or
• By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?

6

Yes

7

Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.

7

Yes

8a

Enter the states to which the foundation reports or with which it is registered (see instructions)
 CA

b

If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation .

8b

Yes

9

Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2015 or the taxable year beginning in 2015 (see instructions for Part XIV)?
If "Yes," complete Part XIV

9

No

10

Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses.

10

No

Form 990-PF (2015)

Part VII-A

Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ROYANDIDAEAGLEFOUNDATION.ORG	13	Yes	
14	The books are in care of ▶SONYA SCHROEDER Located at ▶PO BOX 2210 LOMPOC CA Telephone no ▶(805) 741-7770 ZIP+4 ▶93438			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here ▶ <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year ▶	15		
16	At any time during calendar year 2015, 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 instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR). If "Yes", enter the name of the foreign country ▶	16	Yes	No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? <input type="checkbox"/> Organizations relying on a current notice regarding disaster assistance check here. ▶ <input type="checkbox"/>	1b		No
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2015?.	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015?. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions).	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If "Yes," did it have excess business holdings in 2015 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period?(<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015.</i>).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2015?	4b		No

5a During the year did the foundation pay or incur any amount to

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No


(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions). ☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

Organizations relying on a current notice regarding disaster assistance check here. 

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ **Yes** ☐ **No**
If "Yes," attach the statement required by Regulations section 53.4945-5(d).

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? . . .
If "Yes" to 6b, file Form 8870.

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No

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

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
SONYA SCHROEDER	EXEC DIR/TTEE	125,000	0	0
PO BOX 2210 LOMPOC, CA 93438	30 00			
MARK SCHROEDER	TRUSTEE	31,950	0	0
PO BOX 2210 LOMPOC, CA 93438	5 00			
MEGAN MELERO	TRUSTEE	7,605	0	0
PO BOX 2210 LOMPOC, CA 93438	5 00			

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

[illegible]

Total number of other employees paid over \$50,000.	0
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Part VIII

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services.	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 organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments See instructions	
3	

[illegible]

Part X

Minimum Investment Return

(All domestic foundations must complete this part. Foreign foundations,see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	15,327,392
b	Average of monthly cash balances.	1b	485,613
c	Fair market value of all other assets (see instructions).	1c	57,400
d	Total (add lines 1a, b, and c).	1d	15,870,405
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	15,870,405
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	238,056
5	Net value of noncharitable-use assets.Subtract line 4 from line 3 Enter here and on Part V, line 4	5	15,632,349
6	Minimum investment return.Enter 5% of line 5.	6	781,617

Part XI

Distributable Amount

(see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☒ and do not complete this part.)

1	Minimum investment return from Part X, line 6.	1	781,617
2a	Tax on investment income for 2015 from Part VI, line 5.	2a	22,535
b	Income tax for 2015 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	22,535
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	759,082
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	759,082
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amountas adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	759,082

Part XII

Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26.	1a	704,400
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions.Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	704,400
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions).	5	0
6	Adjusted qualifying distributions.Subtract line 5 from line 4.	6	704,400

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

Part XIII

Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2014	(c) 2014	(d) 2015
1 Distributable amount for 2015 from Part XI, line 7				759,082
2 Undistributed income, if any, as of the end of 2015				
a Enter amount for 2014 only.			48,713	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2015				
a From 2010.				
b From 2011.				
c From 2012.				
d From 2013.				
e From 2014.				
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2015 from Part XII, line 4 ▶ \$ 704,400				
a Applied to 2014, but not more than line 2a			48,713	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2015 distributable amount.				655,687
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2015 (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0			
b Prior years' undistributed income Subtract line 4b from line 2b.		0		
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.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 2014 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015.				103,395
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).	0			
8 Excess distributions carryover from 2010 not applied on line 5 or line 7 (see instructions). . .	0			
9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a.	0			
10 Analysis of line 9				
a Excess from 2011. . . .				
b Excess from 2012. . . .				
c Excess from 2013. . . .				
d Excess from 2014. . . .				
e Excess from 2015. . . .				

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

1a

If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2015, enter the date of the ruling.

b

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

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	Tax year	Prior 3 years			(e) Total
		(a) 2015	(b) 2014	(c) 2013	(d) 2012	
b	85% of line 2a					
c	Qualifying distributions from Part XII, line 4 for each year listed					
d	Amounts included in line 2c not used directly for active conduct of exempt activities					
e	Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3	Complete 3a, b, or c for the alternative test relied upon					
a	"Assets" alternative test—enter (1) Value of all assets (2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b	"Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . . .					
c	"Support" alternative test—enter (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) (2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii). (3) Largest amount of support from an exempt organization (4) Gross investment income					

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

1

Information Regarding Foundation Managers:

a

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

b

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

2

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

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

a

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

SONYA SCHROEDER
PO BOX 2210
LOMPOC, CA 93438
(805) 741-7770

b

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

COMPLETE APPLICATION, AVAILABLE ON WEBSITE, AND ALL REQUIRED ATTACHMENTS

c

Any submission deadlines

SEPTEMBER 15TH

d

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

THE PURPOSE AND ACTIVITIES OF THE FOUNDATION ARE TO SEEK OUT AND PROVIDE FUNDING TO CHARITABLE AND GOVERNMENTAL ORGANIZATIONS THAT PROVIDE SERVICES TO ENCOURAGE AND STRENGTHEN THE FAMILY UNIT AS WELL AS PROVIDE CARE AND PROTECTION FOR DOMESTIC ANIMALS AND INDIGENOUS WILDLIFE. THE TYPES OF ORGANIZATIONS THAT MEET THE PURPOSE OF THE FOUNDATION INCLUDE BUT ARE NOT LIMITED TO THOSE THAT PROVIDE EDUCATIONAL OPPORTUNITIES, MEET EMERGENCY NEEDS, PROMOTE CHARACTER DEVELOPMENT AND SELF RELIANCE, PROVIDE MEDICAL ASSISTANCE TO THOSE WITHOUT SUFFICIENT RESOURCES, AND ORGANIZATIONS THAT PROVIDE FOR THE PROTECTION OF ANIMALS IN THEIR COMMUNITY. CONSIDERATION IS GIVEN TO ORGANIZATIONS PRIMARILY IN SANTA BARBARA COUNTY WITH AN EMPHASIS TO ORGANIZATIONS IN THE NORTH SANTA BARBARA COUNTY REGION WITH THE FOLLOWING CHARITABLE PURPOSES: EDUCATIONAL OPPORTUNITIES, SUPPORT TO ABUSED WOMEN AND CHILDREN/VIOLENCE PREVENTION, HEALTH CARE SERVICES, CRITICAL NEEDS AND ANIMAL PROTECTION AND WELFARE.

Part XV

Supplementary Information(continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	566,000
b Approved for future payment				
Total			3b	0

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount		
1 Program service revenue						
a _____						
b _____						
c _____						
d _____						
e _____						
f _____						
g Fees and contracts from government agencies						
2 Membership dues and assessments.						
3 Interest on savings and temporary cash investments			14	36		
4 Dividends and interest from securities.			14	343,097		
5 Net rental income or (loss) from real estate						
a Debt-financed property.						
b Not debt-financed property.						
6 Net rental income or (loss) from personal property						
7 Other investment income.						
8 Gain or (loss) from sales of assets other than inventory			18	1,024,335		
9 Net income or (loss) from special events						
10 Gross profit or (loss) from sales of inventory						
11 Other revenue a _____						
b _____						
c _____						
d _____						
e _____						
12 Subtotal Add columns (b), (d), and (e).		0		1,367,468		0
13 Total. Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calculations)			13		1,367,468	1,367,468

[illegible]

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ALZHEIMER'S ASSOCIATION 1528 CHAPALA ST SANTA BARBARA,CA 93101	NONE	PC	ELDERLY SUPPORT SERVICES	10,000
ANGELS FOSTER CARE OF SANTA BARBARA 3905 STATE STREET SANTA BARBARA,CA 93105	NONE	PC	YOUTH SUPPORT SERVICES	20,000
ANIMAL SHELTER ASSISTANCE PROGRAM 5473 OVERPASS ROAD SANTA BARBARA,CA 93111	NONE	PC	ANIMAL WELFARE	6,000
CARE 4 PAWS PO BOX 60524 SANTA BARBARA,CA 93160	NONE	PC	ANIMAL WELFARE	10,000
CASA 118 EAST FIGUEROA STREET SANTA BARBARA,CA 93101	NONE	PC	YOUTH SUPPORT SERVICES	30,000
CASA SERENA 1515 BATH STREET SANTA BARBARA,CA 93101	NONE	PC	RECOVERY SUPPORT SERVICES	24,000
CUYAMA VALLEY FAMILY RESOURCE CENTER 4689 HIGHWAY 166 UNIT B NEWCUYAMA,CA 93254	NONE	PC	FAMILY SUPPORT SERVICES	15,000
DOMESTIC VIOLENCE SOLUTIONS PO BOX 1530 SANTA BARBARA,CA 93102	NONE	PC	FAMILY SUPPORT SERVICES	30,000
DOS PUEBLOS ENGINEERING ACADEMY FOUNDATION PO BOX 313 GOLETA,CA 93116	NONE	PC	EDUCATION	4,000
FAMILY SERVICE AGENCY 123 W GUTIERREZ ST SANTA BARBARA,CA 93101	NONE	PC	FAMILY SUPPORT SERVICES	60,000
FOODBANK OF SANTA BARBARA COUNTY 4554 HOLLISTER AVE SANTA BARBARA,CA 93110	NONE	PC	FAMILY SUPPORT SERVICES	20,000
MOUNTAIN VIEW SCHOOL FOUNDATION 5465 QUEEN ANN LN SANTA BARBARA,CA 93111	NONE	PC	EDUCATION	5,000
NEW HOUSE SANTA BARBARA 227 WHALEY ST SANTA BARBARA,CA 93101	NONE	PC	RECOVERY SUPPORT SERVICES	10,000
NORTH COUNTY RAPE CRISIS & CHILD PROTECTION CENTER PO BOX 148 LOMPOC,CA 93438	NONE	PC	FAMILY SUPPORT SERVICES	25,000
ORCUTT AREA SENIORS CENTER (OASIS SENIOR CENTER) PO BOX 2637 ORCUTT,CA 93457	NONE	PC	ELDERLY SUPPORT SERVICES	10,000
Total			3a	566,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
PATHPOINT 315 WHALEY STREET SUITE 102 SANTA BARBARA,CA 93101	NONE	PC	COMMUNITY SUPPORT SERVICES	25,000
SANTA BARBARA PARTNERS IN EDUCATION 3970 LA COLINA ROAD SUITE 9 SANTA BARBARA,CA 93110	NONE	PC	EDUCATION	15,000
SANTA MARIA DISCOVERY MUSEUM 702 S MCCLELLAND ST SANTA MARIA,CA 93454	NONE	PC	EDUCATION	10,000
SANTA MARIA HUMANE SOCIETY 1687 W STOWELL ROAD SANTA MARIA,CA 93458	NONE	PC	ANIMAL WELFARE	2,000
SANTA MARIA VALLEY YMCA 3400 SKYWAY DRIVE SANTA MARIA,CA 93455	NONE	PC	YOUTH SPORTS	20,000
SANTA YNEZ PEOPLE HELPING PEOPLE 545 NORTH ALISAL RD STE 202 SOLVANG,CA 93463	NONE	PC	COMMUNITY SUPPORT SERVICES	35,000
SUSAN G KOMEN FOR THE CURE PO BOX 650309 DALLAS,TX 75265	NONE	PC	HEALTH	1,000
TEDDY BEAR CANCER FOUNDATION 2320 BATH ST SANTA BARBARA,CA 93105	NONE	PC	YOUTH SUPPORT SERVICES	35,000
TEHACHAPI MOUNTAIN RODEO ASSOCIATION PO BOX 63 TECHACHAPI,CA 93581	NONE	PC	YOUTH SPORTS	5,000
UNITED BOY'S & GIRLS 901 NORTH RAILROAD AVENUE SANTA MARIA,CA 93458	NONE	PC	YOUTH SUPPORT SERVICES	40,000
VALLEY HAVEN 1825 ALAMO PINTADO ROAD SOLVANG,CA 93463	NONE	PC	ELDERLY SUPPORT SERVICES	20,000
WOUNDED HEROES FUND 161 N CLARK STREET SUITE 4200 CHICAGO,IL 60601	NONE	PC	VETERAN SUPPORT SERVICES	2,000
DAWG 5480 OVERPASS ROAD SANTA BARBARA,CA 93111	NONE	PC	ANIMAL WELFARE	10,000
GUADALUPE KIDS COME FIRST PO BOX 696 GUADALUPE,CA 93434	NONE	PC	YOUTH SUPPORT SERVICES	15,000
CARRILLO COUNSELING SERVICES 324 E CARRILLO ST C SANTA BARBARA,CA 93101	NONE	PC	COMMUNITY SUPPORT SERVICES	7,000
Total				566,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SANTA MARIA BREAKFAST ROTARY 801 S BROADWAY SANTA MARIA,CA 93454	NONE	PC	COMMUNITY SUPPORT SERVICES	13,000
SECOND CHANCE COCKER RESCUE PO BOX 3325 SANTA BARBARA,CA 93130	NONE	PC	ANIMAL WELFARE	5,000
SHADOW'S FUND PO BOX 1472 LOMPOC,CA 93436	NONE	PC	ANIMAL WELFARE	5,000
TRANSITIONS-MENTAL HEALTH ASSOCIATION 784 HIGH STREET SAN LUIS OBISPO,CA 93401	NONE	PC	COMMUNITY SUPPORT SERVICES	10,000
DRESSEMBER FOUNDATION BLYTHE HILL LOS ANGELES,CA 90041	NONE	PC	WOMENS SUPPORT SERVICES	1,000
MANITOU CAMPS FOUNDATION PO BOX 5099 WESTPORT,CT 06881	NONE	PC	YOUTH SUPPORT SERVICES	1,000
PAYETTE LAKES PROGRESSIVE CLUB PO BOX 1446 MCCALL,ID 83638	NONE	PC	WOMENS SUPPORT SERVICES	5,000
DONNELLY BIBLE CHURCH FW GESTRIN ROAD DONNELLY,ID 83615	NONE	PC	COMMUNITY SUPPORT SERVICES	5,000
Total			3a	566,000

TY 2015 Accounting Fees Schedule

Name: ROY AND IDA EAGLE FOUNDATION

EIN: 26-2505029

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	11,781	5,891		5,890

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

TY 2015 Depreciation Schedule

Name: ROY AND IDA EAGLE FOUNDATION

EIN: 26-2505029

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
LAND	2012-05-07	8,721		L		0	0		
BUILDING	2012-05-07	78,490	5,232	SL	40 0000000000000	1,308	0		
COMPUTER EQUIPMENT	2012-07-01	1,983	992	SL	5 0000000000000	397	0		
OFFICE REMODEL	2012-07-01	8,133	508	SL	40 0000000000000	203	0		
BUILDING	2015-07-14	289,875		SL	40 0000000000000	3,623	0		

TY 2015 Investments Corporate Bonds Schedule**Name:** ROY AND IDA EAGLE FOUNDATION**EIN:** 26-2505029

Name of Bond	End of Year Book Value	End of Year Fair Market Value
WELLS FARGO #XX88	2,240,015	2,218,715
WELLS FARGO #XX73	2,271,687	2,225,943

TY 2015 Investments Corporate Stock Schedule**Name:** ROY AND IDA EAGLE FOUNDATION**EIN:** 26-2505029

Name of Stock	End of Year Book Value	End of Year Fair Market Value
WELLS FARGO #XX34	435,938	711,614
WELLS FARGO #XX27	404,644	497,369
WELLS FARGO #XX32	670,885	650,344
WELLS FARGO #XX56	1,046,543	1,346,922
WELLS FARGO #XX62	1,357,089	1,347,444
WELLS FARGO #XX68	1,047,275	1,493,162
WELLS FARGO #XX77	881,947	1,007,513
WELLS FARGO #XX81	1,066,807	1,316,966
WELLS FARGO #XX82	1,059,525	976,264
WELLS FARGO #XX50	534,794	703,937

TY 2015 Land, Etc. Schedule

Name: ROY AND IDA EAGLE FOUNDATION

EIN: 26-2505029

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
COMPUTER EQUIPMENT	1,983	1,389	594	
OFFICE REMODEL	8,133	711	7,422	
BUILDING	289,875	3,623	286,252	

TY 2015 Legal Fees Schedule

Name: ROY AND IDA EAGLE FOUNDATION

EIN: 26-2505029

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	330	165		165

TY 2015 Other Expenses Schedule**Name:** ROY AND IDA EAGLE FOUNDATION**EIN:** 26-2505029

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
OFFICE EXPENSE	7,169	3,585		3,584
OUTSIDE CONTRACT SERVICES	438	219		219
INSURANCE	824	165		659

TY 2015 Other Professional Fees Schedule

Name: ROY AND IDA EAGLE FOUNDATION

EIN: 26-2505029

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
WELLS FARGO INVESTMENT MGMT FEES	169,365	169,365		0

TY 2015 Taxes Schedule**Name:** ROY AND IDA EAGLE FOUNDATION**EIN:** 26-2505029

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES WITHHELD	8,542	8,542		0
FEDERAL EXCISE TAX	21,161	0		0
FILING FEE	160	0		160
REAL ESTATE TAXES	734	147		587
PAYROLL TAXES	8,203	2,385		5,818