

For calendar year 2013 or tax year beginning

, and ending

Name of foundation JAQUELIN HUME FOUNDATION		A Employer identification number 94-6080099
Number and street (or P O box number if mail is not delivered to street address) 600 MONTGOMERY STREET, STE 2800		B Telephone number 415-705-5115
City or town, state or province, country, and ZIP or foreign postal code SAN FRANCISCO, CA 94111-2803		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 19,488,692.	J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B					
3 Interest on savings and temporary cash investments		58.	58.		STATEMENT 1
4 Dividends and interest from securities		538,003.	538,003.		STATEMENT 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		848,733.			
b Gross sales price for all assets on line 6a		7,833,525.			
7 Capital gain net income (from Part IV, line 2)			848,733.		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income		<249.>	<249.>		STATEMENT 3
12 Total. Add lines 1 through 11		1,386,545.	1,386,545.		
13 Compensation of officers, directors, trustees, etc.		103,107.	0.		103,107.
14 Other employee salaries and wages		68,738.	0.		68,738.
15 Pension plans; employee benefits		620.	0.		620.
16a Legal fees		9,500.	4,750.		4,750.
b Accounting fees		43,511.	33,011.		10,500.
c Other professional fees					
17 Interest		60,000.	0.		0.
18 Taxes					
19 Depreciation and depletion					
20 Occupancy		17,523.	0.		17,523.
21 Travel, conferences, and meetings					
22 Printing and publications		29,094.	13,613.		15,482.
23 Other expenses		332,093.	51,374.		220,720.
24 Total operating and administrative expenses. Add lines 13 through 23		4,356,250.			4,356,250.
25 Contributions, gifts, grants paid					
26 Total expenses and disbursements. Add lines 24 and 25		4,688,343.	51,374.		4,576,970.
27 Subtract line 26 from line 12		<3,301,798.>			
a Excess of revenue over expenses and disbursements			1,335,171.		
b Net investment income (if negative, enter -0-)					
c Adjusted net income (if negative, enter -0-)				N/A	

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value		
Assets	1	Cash - non-interest-bearing		2,132,069.	1,218,817.	1,218,817.
	2	Savings and temporary cash investments				
	3	Accounts receivable ▶				
		Less: allowance for doubtful accounts ▶	47,750.			
	4	Pledges receivable ▶				
		Less: allowance for doubtful accounts ▶				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons				
	7	Other notes and loans receivable ▶				
		Less: allowance for doubtful accounts ▶				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments - U S and state government obligations				
	b	Investments - corporate stock STMT 9	18,888,255.	20,897,140.	18,230,419.	
	c	Investments - corporate bonds				
	Liabilities	11	Investments - land, buildings, and equipment basis ▶	5,184.		
		Less: accumulated depreciation ▶	5,184.			
12		Investments - mortgage loans				
13		Investments - other				
14		Land, buildings, and equipment basis ▶				
		Less: accumulated depreciation ▶				
15		Other assets (describe ▶ STATEMENT 10)	39,705.	39,456.	39,456.	
16		Total assets (to be completed by all filers - see the instructions. Also, see page 1, item 1)	21,107,779.	22,155,413.	19,488,692.	
17		Accounts payable and accrued expenses				
18		Grants payable				
Net Assets or Fund Balances	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable				
	22	Other liabilities (describe ▶ AGENCY PAYABLE FTE)	0.	4,349,432.		
23	Total liabilities (add lines 17 through 22)	0.	4,349,432.			
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	100.	100.		
28	Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.			
29	Retained earnings, accumulated income, endowment, or other funds	21,107,679.	17,805,881.			
30	Total net assets or fund balances	21,107,779.	17,805,981.			
31	Total liabilities and net assets/fund balances	21,107,779.	22,155,413.			

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	21,107,779.
2	Enter amount from Part I, line 27a	2	<3,301,798.>
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	17,805,981.
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	17,805,981.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a CHARLES SCHWAB - WURTS PORTFOLIO	P	VARIOUS	VARIOUS
b CHARLES SCHWAB - WURTS PORTFOLIO	P	VARIOUS	VARIOUS
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 99,944.		99,578.	366.
b 7,733,581.		6,885,214.	848,367.
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(l) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a			366.
b			848,367.
c			
d			
e			

2 Capital gain net income or (net capital loss)	<div> <div>If gain, also enter in Part I, line 7</div> <div>If (loss), enter -0- in Part I, line 7</div> </div>	2	848,733.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)	<div> <div>If gain, also enter in Part I, line 8, column (c).</div> <div>If (loss), enter -0- in Part I, line 8</div> </div>	3	N/A

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2012	4,935,284.	23,421,885.	.210713
2011	5,404,520.	26,426,964.	.204508
2010	5,265,126.	29,744,202.	.177014
2009	7,101,219.	30,271,352.	.234585
2008	4,312,630.	20,724,841.	.208090

2 Total of line 1, column (d)	2	1.034910
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	.206982
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	18,607,691.
5 Multiply line 4 by line 3	5	3,851,457.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	13,352.
7 Add lines 5 and 6	7	3,864,809.
8 Enter qualifying distributions from Part XII, line 4	8	4,576,970.

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary-see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1	13,352.
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)	2	0.
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	3	13,352.
3	Add lines 1 and 2	4	0.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	5	13,352.
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		
6	Credits/Payments		
a	2013 estimated tax payments and 2012 overpayment credited to 2013	6a	43,737.
b	Exempt foreign organizations - tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d	7	43,737.
8	Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> 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	30,385.
11	Enter the amount of line 10 to be credited to 2014 estimated tax <input checked="" type="checkbox"/> 30,385. Refunded <input checked="" type="checkbox"/> 0.	11	0.

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
1c Did the foundation file Form 1120-POL for this year?		X
2 Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation <input checked="" type="checkbox"/> \$ 0. (2) On foundation managers <input checked="" type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input checked="" type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	X	
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input checked="" type="checkbox"/> 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	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X	
14	The books are in care of ► DELIA RISBROUGH Telephone no ► 415-705-5112 Located at ► 600 MONTGOMERY ST, STE 2800, SAN FRANCISCO, CA ZIP+4 ► 94111-2803			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year ► 15 N/A			
16	At any time during calendar year 2013, 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 Form TD F 90-22.1 If "Yes," enter the name of the foreign country ►	16	Yes	No X

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here ► <input type="checkbox"/>	1b	X
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013? ...	1c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)).		
a At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No 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) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions) N/A	2b	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ►		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If "Yes," did it have excess business holdings in 2013 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 2013.) N/A	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? ...	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?	4b	X

Form 990-PF (2013)

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)

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

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?

☐ 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)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☒

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

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

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

☐ Yes ☒ No

6b

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

X

If "Yes" to 6b, file Form 8870.

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

☐ Yes ☒ No

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

N/A

7b

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
WILLIAM J. HUME 600 MONTGOMERY ST., STE 2800 SAN FRANCISCO, CA 94111	PRESIDENT & TRUSTEE 1.00	0.	0.	0.
GEORGE H. HUME 600 MONTGOMERY ST., STE 2800 SAN FRANCISCO, CA 94111	VICE PRESIDENT & TRUSTEE 1.00	0.	0.	0.
EDWARD A. LANDRY 600 MONTGOMERY ST., STE 2800 SAN FRANCISCO, CA 94111	TREASURER & TRUSTEE 1.00	0.	0.	0.
GISELE HUFF 600 MONTGOMERY ST., STE 2800 SAN FRANCISCO, CA 94111	SECRETARY 40.00	103,107.	68,738.	0.

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

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

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

0

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	17,930,449.
b	Average of monthly cash balances	1b	921,028.
c	Fair market value of all other assets	1c	39,580.
d	Total (add lines 1a, b, and c)	1d	18,891,057.
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	18,891,057.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	283,366.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	18,607,691.
6	Minimum investment return. Enter 5% of line 5	6	930,385.

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	930,385.
2a	Tax on investment income for 2013 from Part VI, line 5	2a	13,352.
b	Income tax for 2013. (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	13,352.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	917,033.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	917,033.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	917,033.

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	4,576,970.
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	4,576,970.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	13,352.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	4,563,618.

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 2012	(c) 2012	(d) 2013
1 Distributable amount for 2013 from Part XI, line 7				917,033.
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only			0.	
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2013				
a From 2008	3,300,015.			
b From 2009	5,608,606.			
c From 2010	3,797,788.			
d From 2011	4,118,488.			
e From 2012	3,753,420.			
f Total of lines 3a through e	20,578,317.			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$	4,576,970.			
a Applied to 2012, but not more than line 2a			0.	
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 2013 distributable amount				917,033.
e Remaining amount distributed out of corpus	3,659,937.			
5 Excess distributions carryover applied to 2013 (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	24,238,254.			
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 2012 Subtract line 4a from line 2a Taxable amount - see instr.			0.	
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7	3,300,015.			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	20,938,239.			
10 Analysis of line 9				
a Excess from 2009	5,608,606.			
b Excess from 2010	3,797,788.			
c Excess from 2011	4,118,488.			
d Excess from 2012	3,753,420.			
e Excess from 2013	3,659,937.			

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 STATEMENT A			IRC SEC. 501(C)(3) UNRESTRICTED	4,356,250.
Total			3a	4,356,250.
b Approved for future payment				
NONE				
Total			3b	0.

Jaquelin Hume Foundation
EIN : 94-608009

Grants 2013

Grantee	Amount	Purpose of grant
Alliance for Excellent Education	300,000	IRC Sec 501 "C" "3" Unrestricted
American Enterprise Institute	50,000	IRC Sec 501 "C" "3" Unrestricted
CA Teachers Empowerment Network	25,000	IRC Sec 501 "C" "3" Unrestricted
Cascade Policy Institute	25,000	IRC Sec 501 "C" "3" Unrestricted
Center for Education Reform	150,000	IRC Sec 501 "C" "3" Unrestricted
Colorado Legacy Foundation	200,000	IRC Sec 501 "C" "3" Unrestricted
D.C. Public Education Fund	250,000	IRC Sec 501 "C" "3" Unrestricted
Digital Promise	25,000	IRC Sec 501 "C" "3" Unrestricted
Editorial Projects in Education	50,000	IRC Sec 501 "C" "3" Unrestricted
Education Next	50,000	IRC Sec 501 "C" "3" Unrestricted
Education Superhighway	100,000	IRC Sec 501 "C" "3" Unrestricted
Eldergivers	5,000	IRC Sec 501 "C" "3" Unrestricted
Freedom Foundation	25,000	IRC Sec 501 "C" "3" Unrestricted
Foundation for Excellence in Education	200,000	IRC Sec 501 "C" "3" Unrestricted
Foundation for Teaching Economics	31,250	IRC Sec 501 "C" "3" Unrestricted
Georgia Public Policy Foundation	25,000	IRC Sec 501 "C" "3" Unrestricted
GreatSchools.net	50,000	IRC Sec 501 "C" "3" Unrestricted
Hechinger Institute	150,000	IRC Sec 501 "C" "3" Unrestricted
Illinois Policy Institute	40,000	IRC Sec 501 "C" "3" Unrestricted
iNACOL	275,000	IRC Sec 501 "C" "3" Unrestricted
Independence Institute	40,000	IRC Sec 501 "C" "3" Unrestricted
Innosight Institute	340,000	IRC Sec 501 "C" "3" Unrestricted
Thomas Jefferson Institute	25,000	IRC Sec 501 "C" "3" Unrestricted
Knowledge Works	200,000	IRC Sec 501 "C" "3" Unrestricted
The Learning Accelerator	500,000	IRC Sec 501 "C" "3" Unrestricted
Learning Matters	125,000	IRC Sec 501 "C" "3" Unrestricted
Lexington Institute	50,000	IRC Sec 501 "C" "3" Unrestricted
Mackinac Center for Public Policy	50,000	IRC Sec 501 "C" "3" Unrestricted
James Madison Institute	35,000	IRC Sec 501 "C" "3" Unrestricted
Maine Heritage Policy Center	30,000	IRC Sec 501 "C" "3" Unrestricted
National Center on Time & Learning	200,000	IRC Sec 501 "C" "3" Unrestricted
Nat'l Assoc. of State Board of Education	40,000	IRC Sec 501 "C" "3" Unrestricted
Pacific Research Institute	50,000	IRC Sec 501 "C" "3" Unrestricted
The Philanthropy Roundtable	25,000	IRC Sec 501 "C" "3" Unrestricted
Rhode Island Foundation	70,000	IRC Sec 501 "C" "3" Unrestricted
San Francisco Opera	150,000	IRC Sec 501 "C" "3" Unrestricted
San Francisco Symphony	200,000	IRC Sec 501 "C" "3" Unrestricted
SMUIN Ballet	25,000	IRC Sec 501 "C" "3" Unrestricted

State Policy Network	50,000	IRC Sec 501 "C" "3" Unrestricted
Sutherland Institute	50,000	IRC Sec 501 "C" "3" Unrestricted
Texas Public Policy Foundation	30,000	IRC Sec 501 "C" "3" Unrestricted
VOISE Academy	25,000	IRC Sec 501 "C" "3" Unrestricted
Washington Policy Center	20,000	IRC Sec 501 "C" "3" Unrestricted
Total Grants	<u>4,356,250</u>	

JAQUELIN HUME FOUNDATION
600 Montgomery Street, Suite 2800
San Francisco, CA 94111
(415) 705-5112

PROGRAM GUIDELINES

GENERAL AREAS OF INTEREST

The Jaquelin Hume Foundation was established in San Francisco in 1962 by Mr. and Mrs. Jaquelin H. Hume.

A major portion of the funds at the disposal of the Jaquelin Hume Foundation is used to support activities or organizations having a national impact. These funds are disbursed in major grants which are closely monitored to compare the results with the purpose of the grant. Generally, grants will be made for operations, not equipment or buildings.

The major grants of the Jaquelin Hume Foundation will fall into two primary areas:

1. Education of young people to be better citizens, to have sound values, and to appreciate the value of our free enterprise, incentive-based economy. Grants are aimed at the junior high and high school levels.
2. Improvement of the structure and function of government and the reduction of the influence of the Federal government in our lives.

The balance of the funds of the Jaquelin Hume Foundation will be used to support organizations at the sole discretion of Mrs. Jaquelin H. Hume, the Foundation's president.

APPLICATION GUIDELINES

In keeping with Jaquelin Hume's philosophy of giving and to be as effective as possible in making grant determinations, the following general guidelines apply:

- o Organizations must be classified as 501(c)(3) by the Internal Revenue Service.
- o Organizations must operate within the continental United States.
- o Special Projects are generally preferred.
- o The Foundation generally will not consider institutions or organizations primarily supported by tax-derived funding, including those organizations which may have lost significant government funding.
- o The Foundation will not consider grants to institutions which, in policy or practice, unfairly discriminate on the basis of race, creed, or sex.
- o The Foundation will consider only one request from an organization during any twelve-month period.

Grantees must be able to demonstrate competent administrative capabilities and provide the Foundation with periodic progress reports on programs which the Foundation has funded. Institutions which receive support are responsible to account for how grants from the Foundation have been utilized.

The Jaquelin Hume Foundation has a policy of assessing the results of the grants it awards. It recommends, therefore, that evaluation and follow-up procedures be incorporated into grant requests. Such procedures help to assure the Foundation that the funds awarded are being used for the intended purposes and help both the Foundation and grantee to assess the extent to which the project is achieving the expected results.

APPLICATION PROCEDURES

Applicants should prepare a preliminary one-page letter which outlines the objectives and significance of the proposed project, the design of the project, and the qualifications of the organization and its individuals. Included with the letter should be a copy of the organization's most recent audited financial statements, a projected budget for the project, the amount of support sought from the Foundation, as well as from other funders.

To ensure eligibility for a grant, the applicant should also submit a copy of the IRS letter confirming the organization's tax-exempt status.

All requests will be reviewed and acknowledged promptly. After a review of the initial letter, the Foundation staff will communicate with the person in charge of the proposed project, indicating whether the project qualifies for further consideration. Applicants whose projects meet these criteria will be invited to submit a fully developed proposal.

While grants will be considered throughout the year, the full board meets twice a year to consider major grants.

Proposals and requests for information should be addressed to:

Executive Director
Jaquelin Hume Foundation
600 Montgomery Street, Suite 2800
San Francisco, CA 94111

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

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
INTEREST INCOME	58.	58.	
TOTAL TO PART I, LINE 3	58.	58.	

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
DIVIDEND INCOME	538,003.	0.	538,003.	538,003.	
TO PART I, LINE 4	538,003.	0.	538,003.	538,003.	

FORM 990-PF OTHER INCOME STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
MORGAN STANLEY VENTURES PARTNERS III	<249.>	<249.>	
TOTAL TO FORM 990-PF, PART I, LINE 11	<249.>	<249.>	

FORM 990-PF LEGAL FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	620.	0.		620.
TO FM 990-PF, PG 1, LN 16A	620.	0.		620.

FORM 990-PF	ACCOUNTING FEES			STATEMENT 5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TAX ACCOUNTANT	9,500.	4,750.		4,750.
TO FORM 990-PF, PG 1, LN 16B	9,500.	4,750.		4,750.

FORM 990-PF	OTHER PROFESSIONAL FEES			STATEMENT 6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
MANAGEMENT FEES	33,011.	33,011.		0.
AUDIT EXPENSES	10,500.	0.		10,500.
TO FORM 990-PF, PG 1, LN 16C	43,511.	33,011.		10,500.

FORM 990-PF	TAXES			STATEMENT 7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
EXCISE TAX	60,000.	0.		0.
TO FORM 990-PF, PG 1, LN 18	60,000.	0.		0.

FORM 990-PF	OTHER EXPENSES			STATEMENT 8
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FINANCIAL ADMINISTRATION	27,225.	13,613.		13,613.
COMPUTER SERVICES	1,500.	0.		1,500.
OFFICE EXPENSE	166.	0.		166.
FEES AND LICENSES	160.	0.		160.
BANK FEES	43.	0.		43.
TO FORM 990-PF, PG 1, LN 23	29,094.	13,613.		15,482.

FORM 990-PF	CORPORATE STOCK	STATEMENT	9
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
STOCK INVESTMENT	20,897,140.	18,230,419.
TOTAL TO FORM 990-PF, PART II, LINE 10B	20,897,140.	18,230,419.

FORM 990-PF	OTHER ASSETS	STATEMENT	10
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DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
MORGAN STANLEY VENTURE PARTNERS III	39,705.	39,456.	39,456.
TO FORM 990-PF, PART II, LINE 15	39,705.	39,456.	39,456.