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Form **990-PF**Department of the Treasury

Return of Private Foundation

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

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

2013

For calendar year 2013 or tax year beginning and ending Name of foundation A Employer identification number 46-1536434 JAY L SMITH FAMILY FOUNDATION Number and street (or P O box number if mail is not delivered to street address) Room/suite B Telephone number 469 S. MCDONOUGH STREET 334-834-8000 City or town, state or province, country, and ZIP or foreign postal code C If exemption application is pending, check here MONTGOMERY, AL36104 Initial return G Check all that apply: Initial return of a former public charity D 1. Foreign organizations, check here Final return Amended return 2. Foreign organizations meeting the 85% test, check here and attach computation Address change Name change Section 501(c)(3) exempt private foundation Check type of organization: E If private foundation status was terminated Section 4947(a)(1) nonexempt charitable trust _____ Other taxable private foundation under section 507(b)(1)(A), check here I Fair market value of all assets at end of year | J | Accounting method: Accrual F If the foundation is in a 60-month termination (from Part II, col (c), line 16) Other (specify) under section 507(b)(1)(B), check here 2,279,818. (Part I, column (d) must be on cash basis) ▶\$ Part | Analysis of Revenue and Expenses (d) Disbursements for charitable purposes (cash basis only) (a) Revenue and (b) Net investment (c) Adjusted net (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a)) expenses per books income income 1,629 N/A Contributions, gifts, grants, etc., received 2 Check X If the foundation is not required to attach Sch. B Interest on savings and temporary cash investments 100 100. STATEMENT Dividends and interest from securities 49,113 49,113. STATEMENT 5a Gross rents b Net rental income or (loss) 146,687 6a Net gain or (loss) from sale of assets not on line 10 b Gross sales price for all assets on line 6a 1,545,441. 146,687 Capital gain net income (from Part IV, line 2) Net short-term capital gain Income modifications 10a Gross sales less returns and allowances b Less Cost of goods sold c Gross profit or (loss) 11 Other income 529 195,900 Total Add lines 1 through 11 0 0. Compensation of officers, directors, trustees, etc. 14 Other employee salaries and wages 15 Pension plans, employee benefits 0. 16a Legal fees STMT 3 1,270 0 STMT 4 <u>1,315</u>. 0 **b** Accounting fees 0. 19,302. c Other professional fees RFC STMT [5 19,302. 17 Interest 18 Taxes 19 Depreciation an appletion AY 1 5 2014 20 Occupancy 21 Travel, conferences, and meetings N, UT 22 Printing and publications 23 Other expenses 24 Total operating and administrative expenses Add lines 13 through 23 21,887 19,302 0 25 Contributions, gifts, grants paid 4,832 832. (1)26 Total expenses and disbursements 26,719 19,302 4,832. Add lines 24 and 25 27 Subtract line 26 from line 12: 170,810 8 Excess of revenue over expenses and disbursements 176,598 b Net investment income (if negative, enter -0-) N/A c Adjusted net income (if negative, enter -0-)

P	art	Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only	beginning of year	(h) Pool Value	`
_	-		(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash - non-interest-bearing	121 004	114 210	114 210
	I	Savings and temporary cash investments	131,904.	114,210.	114,210.
	3	Accounts receivable -			
	١.	Less: allowance for doubtful accounts			
	4	Pledges receivable >			
	_	Less: allowance for doubtful accounts			
	1 -	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other			
	l _	disqualified persons			
	7	Other notes and loans receivable			
	١.	Less: allowance for doubtful accounts			
Assets	_	Inventories for sale or use			
Ass	I	Prepaid expenses and deferred charges			
•	1	Investments - U.S. and state government obligations	000 220	1 125 120	1 250 542
	1	Investments - corporate stock STMT 6	890,339.	1,135,439.	1,352,749.
		Investments - corporate bonds			
	11	Investments - land, buildings, and equipment basis			
	4.	Less accumulated depreciation			
		Investments - mortgage loans	024 012	F01 0F0	010 050
	13	Investments - other STMT 7	834,213.	781,978.	812,859.
	14	Land, buildings, and equipment: basis			
	4.5	Less accumulated depreciation		-	
	I	Other assets (describe			********
	16	Total assets (to be completed by all filers - see the	1 056 456	2 021 627	2 270 010
_	17	Instructions. Also, see page 1, item 1)	1,856,456.	2,031,627.	2,279,818.
	I	Accounts payable and accrued expenses Grants payable		·	
t/s	19	Deferred revenue	· - · · -		
Liabilities	20	Loans from officers, directors, trustees, and other disqualified persons			
ig.	21	Mortgages and other notes payable			
Ë	1	Other liabilities (describe)			
	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.			
ces	24	Unrestricted			
<u>a</u>	25	Temporarily restricted			
Net Assets or Fund Balan	26	Permanently restricted			
Pu		Foundations that do not follow SFAS 117, check here			
Ĩ		and complete lines 27 through 31.			
S	27	Capital stock, trust principal, or current funds	0.	0.	
set	28	Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
Ę	29	Retained earnings, accumulated income, endowment, or other funds	1,856,456.	2,031,627.	
Š	30	Total net assets or fund balances	1,856,456.	2,031,627.	
_	31	Total liabilities and net assets/fund balances	1,856,456.	2,031,627.	
P	art	III Analysis of Changes in Net Assets or Fund B	alances		
			20		
ı		net assets or fund balances at beginning of year - Part II, column (a), line	JU		1 056 456
9		st agree with end-of-year figure reported on prior year's return) r amount from Part I, line 27a		1	1,856,456.
		r increases not included in line 2 (itemize) PRIOR PERIO	D AD THEM PAIM	2	170,810.
		lines 1, 2, and 3	T WINDOUTHENT	3	4,361.
		eases not included in line 2 (itemize)		4	2,031,627.
		net assets or fund balances at end of year (line 4 minus line 5) - Part II, co	nlumn (h) line 30	5	2,031,627.
<u> </u>		Talling of the control of the contro	(o) inio oo	101	Form 990-PF (2013)
					- (-0,0)

46-1536434

Page 2

JAY L SMITH FAMILY FOUNDATION

Form 990-PF (2013)

		ITH FAMILY					4	6-153	6434	Page 3
 		ses for Tax on In		t income	L(b)	How acquired	1			
		d(s) of property sold (e.g. common stock, 200 shs			D	How acquired - Purchase - Donation		acquired day, yr.)	(d) Dai (mo., d	
1a										
b SEE ATTACHED	STAT	EMENT			\vdash		ļ			
е			-				· · · · · ·			
(e) Gross sales price		preciation allowed (or allowable)		st or other basis expense of sale				Gain or (loss) s (f) minus (
a			1							
b				 						
<u>C</u>										
e 1,545,441.				1,398,77	77.				146	,687.
Complete only for assets showin	ig gain in co	plumn (h) and owned by t			<u>, , , , , , , , , , , , , , , , , , , </u>		(I) Gains (Col (h) gain		, 00 / 1
(i) F.M.V. as of 12/31/69	(j)	Adjusted basis is of 12/31/69	(k) Ex	cess of col. (i) col. (j), if any			col. (k), but	not less than (from col. (1 -0-) or	
a .										
b										
d		<u></u>					· · · · · · · · · · · · · · · · · · ·			
e							· · · · ·		146	,687.
2 Capital gain net income or (net ca	pital loss)	{ If gain, also enter If (loss), enter -0-	ın Part I, line - ın Part I, line	7 7	}	2			•	,687.
 Net short-term capital gain or (los If gain, also enter in Part I, line 8, 			ıd (6):		}					
If (loss), enter -0- in Part I, line 8 Part V Qualification U	nder Se	ction 4940(e) for	Reduced	Tay on Net	Inv	3 estment l	ncome	N/A		
(For optional use by domestic private							11001110			
			1570(a) tax on	i not invostinciat in	icomi	·· <i>)</i>				
If section 4940(d)(2) applies, leave the	ns part blan	ık.								
Was the foundation liable for the sect	tion 4942 ta	x on the distributable am	ount of any ye	ear in the base per	rıod?				Yes	X No
If "Yes," the foundation does not qual								 ,		
1 Enter the appropriate amount in 6	each colum		nstructions be	fore making any e	ntries	i.	- 1		/d\	
(a) Base period years Calendar year (or tax year beginnii	2010)	(b) Adjusted qualifying dist	tributions	Net value of no	(c) Incha		ets	Distrib (col. (b) div	(d) ution ratio	(0))
2012	''y ''')		0.			82,04		(col. (b) div		00000
2011						02,09	= -		• • •	00000
2010				,						
2009										
2008										
2 Total of line 1, column (d)							2		.0	00000
3 Average distribution ratio for the state foundation has been in exister		·	on line 2 by 5,	or by the number	of ye	ars	3_		.0	00000
4 Enter the net value of noncharitab	ile-use asse	ts for 2013 from Part X, I	line 5				4	ļ	2,090	<u>,774.</u>
5 Multiply line 4 by line 3							5_			0.
6 Enter 1% of net investment incom	ne (1% of P	art I, line 27b)					6_		1	<u>,766.</u>
7 Add lines 5 and 6							7		1	,766.
B Enter qualifying distributions from			1h and some	slate that now	o o 11	9/ tay sata	8		4	,832.
If line 8 is equal to or greater than See the Part VI instructions.	i inic 7, CHE	on the box in Pall VI, ille	io, and comp	mete mat part USIN	ıya i	/o lax fale.				

	n 990-PF (2013) JAY L SMITH FAMILY FOUNDATION Int VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b)	4940(e) or 4		15364			Page 4
	Exempt operating foundations described in section 4940(d)(2), check here and enter "N/A" on line 1			1		01.0.	,
10.	Date of ruling or determination letter: (attach copy of letter if necessary-see instru						
Ь	Domestic foundations that meet the section 4940(e) requirements in Part V, check here X and enter		1			1.7	66.
-	of Part I, line 27b		<u> </u>			<u> </u>	<u> </u>
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12,	col. (b).					
	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	001. (0).	2				0.
	Add lines 1 and 2		3			1.7	66.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	_			0.
	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5			1,7	66.
	Credits/Payments:						
	2013 estimated tax payments and 2012 overpayment credited to 2013 6a						
	Exempt foreign organizations - tax withheld at source 6b		1				
	Tax paid with application for extension of time to file (Form 8868) 6c		1				
	Backup withholding erroneously withheld 6d		1				
	Total credits and payments Add lines 6a through 6d		1 7				0.
	Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached		8	<u> </u>			6.
	Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed	•	9			1,7	
	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid		10	-			
	Enter the amount of line 10 to be: Credited to 2014 estimated tax	Refunded -	11				
	rt VII-A Statements Regarding Activities			1			
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it par	ticipate or intervene	e in			Yes	No
	any political campaign?	•			1a		X
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instruction	ns for the definition	1)?		1b		X
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any			Ī			
	distributed by the foundation in connection with the activities	•					
C	Did the foundation file Form 1120-POL for this year?				1c		х
	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:			Ī			
Ī	(1) On the foundation. ▶ \$ \$ \$	0.					
е	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed		-	-			
	managers. ►\$ 0.			l			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?				2		х
	If "Yes," attach a detailed description of the activities			ſ			
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, article	s of incorporation,	ОГ				
	bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	, ,			3		Х
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?			Ī	4a		X
	If "Yes," has it filed a tax return on Form 990-T for this year?		N	/A [4b		
	Was there a liquidation, termination, dissolution, or substantial contraction during the year?		-	·	5		Х
	If "Yes," attach the statement required by General Instruction T.			ľ			
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 c	onflict with the stat	e law		ĺ		
	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, co	ol. (c), and Part XI	/		7	X	
				ſ			
8a	Enter the states to which the foundation reports or with which it is registered (see instructions)						
	AL						
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (o	r designate)		_			
	of each state as required by General Instruction G? If "No," attach explanation			Ĺ	8b	Х	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) of	r 4942(j)(5) for cal	endar				
	year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? If "Yes," complete Part XI	V		Ĺ	9		X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names	and addresses			10		X
				Form	990	-PF((2013)

11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If Yes,* attach schedule (see instructions) 12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? 13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? 14 The books are in care of The FOUNDATION 15 Section 4947(a)(1) nonexempt charitable triusts 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 Section 4947(a)(1) nonexempt charitable triusts 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 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? 16 Set the instructions for exceptions and filing requirements for Form TD F 90-22.1. If Yes,* enter the name of the foreign country. 17 Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required 18 During the year did the foundation (either directly or indirectly): 19 Engage in the sale or exchange, or leasing of property with a disqualified person? 19 Yes X No 20 Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? 19 Yes X No 21 Furnish goods, services, or facilities to (or accept them from) a disqualified person? 22 Private and the foundation of government service, if terminating within 90 days.) 33 Furnish goods, services, or facilities to for members the expenses of, a disqualified person? 34 Yes X No 35 Furnish goods, services, or facilities to for otherwise extend credit to (or a period after termination of government service, if terminating within 90 days.) 35 Furnish goods, services,	rectly or indirectly, own a controlled entity within the meaning of instructions) advised fund over which the foundation or a disqualified person had advisory privileges? 12		<u> </u>	Page 5
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) 13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? 14 The books are in care of ▶ THE FOUNDATION 15 Cocated at ▶ 469 S. MCDONOUGH STREET, MONTGOMERY, AL 16 At any time during calendar year 2013, did the foundation have initierest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? 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? 16 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. 1 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? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? wes X No (6) Agree to pay money or orpoerty 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.) 1 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(6)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current n	advised fund over which the foundation or a disqualified person had advisory privileges? It is advised fund over which the foundation or a disqualified person had advisory privileges? It is a state of the form is annual returns and exemption application? It is a state of the	Part VII-A Statements Regarding Activities (continued)		
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 13 X	advised fund over which the foundation or a disqualified person had advisory privileges? 12	1 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of		
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 13 X	advised fund over which the foundation or a disqualified person had advisory privileges? 12	section 512(b)(13)? If "Yes," attach schedule (see instructions)	11	X
If Yes, 'attach statement (see instructions) 12	tion requirements for its annual returns and exemption application? 12	2 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges	2	
13	DATION Telephone no. ▶ 334-834-8000 H STREET, MONTGOMERY, AL ZIP+4 ▶ 36104 Hing Form 990-PF in lieu of Form 1041 - Check here Ved or accrued during the year undidation have an interest in or a signature or other authority over a bank, country? If N/A			X
Website address ▶ N/A 14 The books are in care of ▶ THE FOUNDATION Located at ▶ 469 S. MCDONOUGH STREET, MONTGOMERY, AL 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 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? 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? 16 See the instructions for exceptions and filling requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country 17 Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required 18 The Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 19 During the year did the foundation (either directly or indirectly): 10 Engage in the sale or exchange, or leasing of property with a disqualified person? 10 Yes I No 11 Engage in the sale or exchange, or leasing of property with a disqualified person? 12 Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? 13 Furnish goods, services, or facilities to (or accept them from) a disqualified person? 14 Yes I No 15 Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either	DATION H STREET, MONTGOMERY, AL Ining Form 990-PF in lieu of Form 1041 - Check here wed or accrued during the year Indiation have an interest in or a signature or other authority over a bank, country? Different of Form 10 F 90-22.1. If "Yes," enter the name of the foreign Indiation have an interest in or a signature or other authority over a bank, country? Different of Form 10 F 90-22.1. If "Yes," enter the name of the foreign Indiation have an interest in or a signature or other authority over a bank, country? Different of Form 10 F 90-22.1. If "Yes," enter the name of the foreign Indiation have an interest in or a signature or other authority over a bank, country? Indiation have an interest in or a signature or other authority over a bank, country? Indiation have an interest in any business enterprise at any time Indiation is not applying the provisions of section 4942(a)(2) (relating to incorrect come? (If applying section 4942(a)(2) to all years listed, answer "No" and attach applied to any of the years listed in 2a, list the years here Indirect interest in any business enterprise at any time Indirect interest in any business enterprise at any time Indirect interest in any business enterprise at any time Indirect interest in any business enterprise at any time Indirect interest in any business enterprise at any time Indirect interest in any business enterprise at any time Indirect interest in any business enterprise at any time Indirect interest in any business enterprise at any time Indirect interest in any business enterprise at any time Indirect interest in any business enterprise at any time Indirect interest in any business enterprise at any time Indirect interest in any business enterprise at any time Indirect interest in any business enterprise at any time Indirect interest in any business enterprise at any time Indirect interest in any business enterprise at any time Indirect interest in any business enterprise at any time Indirect interest in any business enterprise at	·		
The books are in care of Park FOUNDATION Located at P49 S. MCDONOUGH STREET, MONTGOMERY, AL IS 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 and enter the amount of tax-exempt interest received or accrued during the year and enter the amount of tax-exempt interest received or accrued during the year 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 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. 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? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? (6) Agree to pay money or property to a government official? (Exception Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) b If any answer is Yes' to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that we	H STREET, MONTGOMERY, AL Inling Form 990-PF in lieu of Form 1041 - Check here		<u> </u>	
Located at \$\insert 469 S. MCDONOUGH STREET, MONTGOMERY, AL International content International color I	H STREET, MONTGOMERY, AL Inling Form 990-PF in lieu of Form 1041 - Check here		1-834-80	000
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	Interpretable form 1041 - Check here with accurate of the form 1041 - Check here wed or accrued during the year undation have an interest in or a signature or other authority over a bank, country? Interpretable for which Form 4720 May Be Required Interpretable for accept it from the interpretable for indirectly): Interpretable for accept it from the individual form of accept it from the individual for a period after stang within 90 days.) Interpretable for a period after stang within 90 days.) Interpretable for a period after stang within 90 days.) Interpretable for a period after stang within 90 days.) Interpretable for a period after stange within 90 days.) Interpretable for a period after stange within 90 days.) Interpretable for a period after stange for accept in form of the acts described in 1a, other than excepted acts, that were not corrected for the acceptable in 1a, other than excepted acts, that were not corrected for accept in form of the acts described in 1a, other than excepted acts, that were not corrected form of the acceptable for a period acceptable for a period form of the acceptable for a period form of the acceptable	-		
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defined in section 4942(j)(3) or 4942(j)(5)).	ndation is not applying the provisions of section 4942(a)(2) (relating to incorrect come? (If applying section 4942(a)(2) to all years listed, answer "No" and attach applied to any of the years listed in 2a, list the years here Indirect interest in any business enterprise at any time O13 as a result of (1) any purchase by the foundation or disqualified persons after (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose a lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, and excess business holdings in 2013) N/A	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	ndation is not applying the provisions of section 4942(a)(2) (relating to incorrect come? (If applying section 4942(a)(2) to all years listed, answer "No" and attach applied to any of the years listed in 2a, list the years here Indirect interest in any business enterprise at any time O13 as a result of (1) any purchase by the foundation or disqualified persons after (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose a lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, and excess business holdings in 2013) N/A			
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WING THAT	adation is not applying the provisions of section 4942(a)(2) (relating to incorrect come? (If applying section 4942(a)(2) to all years listed, answer "No" and attach applied to any of the years listed in 2a, list the years here Indirect interest in any business enterprise at any time O13 as a result of (1) any purchase by the foundation or disqualified persons after (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose a lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, need excess business holdings in 2013) N/A	MAN ALLON		
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	come? (If applying section 4942(a)(2) to all years listed, answer "No" and attach Applied to any of the years listed in 2a, list the years here Indirect interest in any business enterprise at any time O13 as a result of (1) any purchase by the foundation or disqualified persons after (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose a lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, need excess business holdings in 2013) N/A			
valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach	applied to any of the years listed in 2a, list the years here Trindirect interest in any business enterprise at any time O13 as a result of (1) any purchase by the foundation or disqualified persons after (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose a lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, had excess business holdings in 2013)			
	applied to any of the years listed in 2a, list the years here ,		/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	rindirect interest in any business enterprise at any time Yes X No 013 as a result of (1) any purchase by the foundation or disqualified persons after (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose elapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, and excess business holdings in 2013) N/A			$\overline{}$
_	O13 as a result of (1) any purchase by the foundation or disqualified persons after (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose a lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, and excess business holdings in 2013)			
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time	Yes X No 013 as a result of (1) any purchase by the foundation or disqualified persons after (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose a lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, and excess business holdings in 2013) N/A		j	
· · · · · · · · · · · · · · · · · · ·	013 as a result of (1) any purchase by the foundation or disqualified persons after (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose a lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, had excess business holdings in 2013.) N/A		INO	
	(or longer period approved by the Commissioner under section 4943(c)(7)) to dispose alapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, ned excess business holdings in 2013.) N/A 3b	<u> </u>	110	
	e lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, and excess business holdings in 2013.) N/A 3b	during the year?	1 1	
	nad excess business holdings in 2013) N/A 3b	during the year? Lamb If "Yes," did it have excess business holdings in 2013 as a result of (1) any purchase by the foundation or disqualified persons after	1 1	1
		during the year? • Yes • 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		l
	nunt in a manner that would inconstruct the charitable oursessed.	during the year? 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,	/3	
		during the year? 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)		
b Lift the following make any investment in a prior year (but after December 33, 1969) that could be partiable his charitable nursoes that	r year (but after December 31, 1969) that could jeopardize its charitable purpose that	during the year? • 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) No. 10 the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	/A 3b 4a	X
		during the year? • 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) No. 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that	4a	
	first day of the tax year beginning in 2013?	during the year? • 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) No. 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that	4a	

			46-15364	34 Page 6
	1 FOITH 4/20 May be	nequireu (contin	uea)	1 1
(1) Carry on propaganda, or otherwise attempt to influence legislation (sec			es X No	
(2) Influence the outcome of any specific public election (see section 4955) any voter registration drive?); or to carry on, directly or indi		es X No	
•	es?	=	s X No	
			.3 🕮 110	
• •	tion described in section		s X No	
	Attachments Regarding Activities for Which Form 4720 May Be Required the foundation pay or incur any amount to: propaganda, or otherwise attempt to influence legislation (section 4945(e))? the outcome of any specific public influence legislation (section 4945(e))? grant to an individual for travel, study, or other similar purposes? grant to an organization other than a charitable, etc., organization described in section (.2), or (3), or section 4940(d)(2)? or any purpose other than religious, charitable, scientific, literary, or educational purposes, or for intion of cruelty to children or animals? is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Reg 45 or in a current notice regarding disaster assistance (see instructions)? relying on a current notice regarding disaster assistance (see instructions)? relying on a current notice regarding disaster assistance (see instructions)? relying on a current notice regarding disaster assistance (see instructions)? At the statement required by Regulations section 53.4945-5(d). Attion, during the year, receive any funds, directly or indirectly, to pay premiums on helific contract? Attion, during the year, pay premiums, directly or indirectly, on a personal benefit contract? Attion, during the year, pay premiums, directly or indirectly, on a personal benefit contract? Attion, during the year, pay proceeds or have any net income attributable to the transaction? a foundation receive any proceeds or have any net income attributable to the transaction? The Form 8870 The Silventian About Officers, Directors, Trustees, Foundation Managorate in the payon of the			
the prevention of cruelty to children or animals?	ry, or educational purposes, or		es X 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 ins	tructions)?		N/A	5b
Organizations relying on a current notice regarding disaster assistance chec	k here			1 1
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption	n from the tax because it mainta	ained	_	
expenditure responsibility for the grant?	1	N/A Ye	es No	
If "Yes," attach the statement required by Regulations section 53.45	945-5(d).			
6a Did the foundation, during the year, receive any funds, directly or indirectly,	to pay premiums on			
a personal benefit contract?		Ye	es 🗓 No]
b Did the foundation, during the year, pay premiums, directly or indirectly, on	a personal benefit contract?			6b X
If "Yes" to 6b, file Form 8870				
7a At any time during the tax year, was the foundation a party to a prohibited ta	x shelter transaction?	Y6	es 🗶 No 📙	
				7b
Part VIII Information About Officers, Directors, True Paid Employees, and Contractors	stees, Foundation Ma	anagers, Highly	/	
1 List all officers, directors, trustees, foundation managers and the	ir compensation.			
(a) Name and address	hours per week devoted	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
DR. HOLLY L SMITH ROTH			, , , , , ,	
3289 CORWIN DRIVE				
MONTGOMERY, AL 36106	2.00	0.	0.	0.
GERALDINE SMITH		T FINANCE		
436 SIERRA CIRCLE				
RENO, NV 89511	2.00	0.	0.	0.
DEBORAH ANN SMITH CLANCY	VICE PRESIDE			
5317 N. PERSIMMON DRIVE				
BEVERLY HILLS, FL 34465	2.00	0.	0.	0.
VON G. MEMORY	SECRETARY/TRI	EASURER		
469 S. MCDONOUGH STREET				
MONTGOMERY, AL 36104		0.	0.	0.
2 Compensation of five highest-paid employees (other than those i	ncluded on line 1). If none	, enter "NONE."		
(a) Name and address of each employee paid more than \$50,000	hours per week	(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				

Form 990-PF (2013) Part VIII Information About Officers, Directors, Trustees, Foundation Paid Employees, and Contractors (continued)		1536434 Page 7
3 Five highest-paid independent contractors for professional services. If none, enter "I	IONE."	
(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 statistica number of organizations and other beneficiaries served, conferences convened, research papers product N/A	I information such as the ed, etc.	Expenses
2		
3		
Port IV P O		
Part IX-B Summary of Program-Related Investments Describe the two largest program-related investments made by the foundation during the tax year on line	s 1 and 2	Amount
1 N/A	3 1 4110 2.	Amount
2		
All other program-related investments. See instructions. 3		
Total. Add lines 1 through 3	>	0.

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

Form **990-PF** (2013)

4,832.

1,766.

3,066.

3b

4

5

6

b Cash distribution test (attach the required schedule)

Adjusted qualifying distributions. Subtract line 5 from line 4

4940(e) reduction of tax in those years.

income. Enter 1% of Part I, line 27b

Qualifying distributions Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4

Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment

Part XIII Undistributed Income (see instructions)

2 Undistributed income, if any, as of the end of 2013 a Enter amount for 2012 only b Total for prior years: 3,832. Excess distributions carryover, if any, to 2013: a From 2008 EFrom 2010 dFrom 2011 eFrom 2012 f Total of lines 3a through e 4 Oualifying distributions for 2013 from Part XII, line 4; 5 4,832. a Applied to 2012, but not more than line 2a b Applied to 2012, but not more than line 2a b Applied to 2012, but not more than line 2a b Applied to 2012, but not more than line 2a compared - see instructions) e (Election required - see instructions) o . 6 Treated as distributions out of corpus (Election required - see instructions) o . 6 Enter the net total of each column as indicated below: a Corpus Add lines 31, 4c, and 4e Subtract line 5 b Prory years' undistributed income Conduction of the Applied to 2013 with the same amount fine 2b conduction of the first butted income of the same amount fine 2b conduction of the same amount fine 2b conduction of the first butted income of the same amount fine 2b conduction of the same		(a) Corpus	(b) Years prior to 2012	(c) 2012	(d) 2013
2 Undistributed income, if any, as of the end of 2013 a Enter amount for 2012 only b Total for prior years: 3,832. Excess distributions carryover, if any, to 2013: a From 2008 EFrom 2010 dFrom 2011 eFrom 2012 f Total of lines 3a through e 4 Oualifying distributions for 2013 from Part XII, line 4; 5 4,832. a Applied to 2012, but not more than line 2a b Applied to 2012, but not more than line 2a b Applied to 2012, but not more than line 2a b Applied to 2012, but not more than line 2a compared - see instructions) e (Election required - see instructions) o . 6 Treated as distributions out of corpus (Election required - see instructions) o . 6 Enter the net total of each column as indicated below: a Corpus Add lines 31, 4c, and 4e Subtract line 5 b Prory years' undistributed income Conduction of the Applied to 2013 with the same amount fine 2b conduction of the first butted income of the same amount fine 2b conduction of the same amount fine 2b conduction of the first butted income of the same amount fine 2b conduction of the same	· •				102,773.
b Total for prior years: 3 Excess distributions carryover, if any, to 2013: a From 2008 b From 2009 e From 2010 d From 2011 e From 2011 e From 2012 1 Total of lines 3a through e 4 Qualifying distributions for 2013 from Part XII, line 4 >> \$ 4,832. a Applied to 2012, 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 (Electron required - see instructions) d Applied to 2013 distributable amount e Remaining amount distributed out of corpus field a mount appears in column (a), the same amount must be shown in eclulum (a)) 5 Excess distributions carryover applied to 2013 (if an amount appears in column (a), the same amount must be shown in eclulum (a)) 8 Corpus Add lines 3f, 4c, and 4e Subtract line 5 b Prior years' undistributed income. Subtract line 4b from line 2b e Center 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	2 Undistributed income, if any, as of the end of 2013				
3 Excess distributions carryover, if any, to 2013: a From 2008 b From 2009 c From 2010 d From 2011 e From 2012 1 Total of lines 3a through e 4 Qualifying distributions for 2013 from Part XII, line 4: ► \$ 4,832. a Applied to 2012, 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 2013 distributable amount e Remaining amount distributed out of corpus 5 Excess distributions curryowr applied to 2013 (if an amount appears in oclimin (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 Prory 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	a Enter amount for 2012 only			3,832.	
a From 2008 b From 2010 d From 2010 d From 2011 e From 2012 1 Total of lines 3a through e 4 Oualifying distributions for 2013 from Part XII, line 4: ▶ \$ 4,832. a Applied to 2012, but not more than line 2a b Applied to 2012, but not more than line 2a b Applied to 2012, but not more than line 2a b Applied to 2013, but not grown of prior years (Election required - see instructions) c Treated as distributions out of corpus ((Election required - see instructions) d Applied to 2013 distributed amount e Remaining amount distributed out of corpus 5 Excess distributions earryover applied to 2013 (frian amount appears in column (d), the same amount must be shown 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 31, 4c, and 4e Subtract line 5 b Prior years' undistributed morme. Subtract line 4b from line 2b c Enter the amount of prior years' undistributed morme 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	b Total for prior years:		0	-	
b From 2009 c From 2010 d From 2011 lefrom 2012 f Total of lines 3a through e 4 Oualitying distributions for 2013 from Part XII, line 4: \(\sigma \subseteq \frac{4}{832} \). a Applied to 2012, 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 2013 distributable amount e Remaining amount distributed out of corpus 5 Excess distributions carryover applied to 2013 (if an amount appears 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 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	3 Excess distributions carryover, if any, to 2013:		U.		
c From 2010 d From 2011 e From 2012 1 Total of lines 3a through e 4 Oualifying distributions for 2013 from Part XII, line 4: ▶ \$ 4,832. a Applied to 2012, but not more than line 2a b Applied to 2012, 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 2013 distributable amount e Remaining amount distributed out of corpus 5 Excess distributions carrover applied to 2013 (iff an amount appears in column (e), the same amount must be shown in column (e), the same amount must be shown in column (e). 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 494(2) tax has been previously assessed d Subtract line 6c from line 6b. Taxable	a From 2008				
d From 2011 e From 2012 1 Total of lines 3a through e 4 Qualifying distributions for 2013 from Part XII, line 4: ► \$ 4,832. a Applied to 2012, 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 2013 distributable amount e Remaining amount distributed out of corpus 5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be abown in column (d), the same amount must be abown in column (d), the same amount must be abown in column (d). 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 deliciency has been issued, or on which the section 4942(a) tax has been previously assessed d Subtract line 6b. Taxable	b From 2009				
e From 2012 f Total of lines 3a through e 4 Qualifying distributions for 2013 from Part XII, line 4: ► \$ 4 , 832. a Applied to 2012, 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 2013 distributable amount e Remaining amount distributed out of corpus 5 Excess distributions carryover applied to 2013 (if an amount appears in column (g), 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	c From 2010				
f Total of lines 3a through e 4 Qualifying distributions for 2013 from Part XII, line 4: ►\$	d From 2011				
4 Qualifying distributions for 2013 from Part XII, line 4: \$\infty\$ \$\frac{4,832}{.}\$ a Applied to 2012, 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 2013 distributable amount e Remaining amount distributed out of corpus Execses distributions carryover applied to 2013 off an amount appears in column (d), the same amount must be shown in column (a)) 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	e From 2012				
Part XII, line 4: ► \$ 4,832. a Applied to 2012, 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 2013 distributable amount e Remaining amount distributed out of corpus 5 Excess distributions carryover applied to 2013 (if an amount appears in column (d), the same amount must be shown in column (d). 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	f Total of lines 3a through e	0.			
a Applied to 2012, 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 2013 distributable amount e Remaining amount distributed out of corpus 5 Excess distributions carryover applied to 2013 (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	4 Qualifying distributions for 2013 from				
a Applied to 2012, 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 2013 distributable amount e Remaining amount distributed out of corpus 5 Excess distributions carryover applied to 2013 (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	Part XII, line 4: ► \$ 4,832.				
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 2013 distributable amount e Remaining amount distributed out of corpus 5 Excess distributions carryover applied to 2013 (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 31, 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	a Applied to 2012, but not more than line 2a			3,832.	
c Treated as distributions out of corpus (Election required - see instructions) d Applied to 2013 distributable amount e Remaining amount distributed out of corpus 5 Excess distributions carryover applied to 2013 (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	b Applied to undistributed income of prior				
(Electron required - see instructions) d Applied to 2013 distributable amount e Remaining amount distributed out of corpus 5 Excess distributions carryover applied to 2013 (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	years (Election required - see instructions)		0.		
d Applied to 2013 distributable amount e Remaining amount distributed out of corpus 5					
e Remaining amount distributed out of corpus 5	(Election required - see instructions)	0.			
e Remaining amount distributed out of corpus 5	d Applied to 2013 distributable amount				1,000.
(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	e Remaining amount distributed out of corpus	0.	·		
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	(If an amount appears in column (d), the same amount	0.			0.
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	6 Enter the net total of each column as				
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	& Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
Inne 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					-
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	· · · · · · · · · · · · · · · · · · ·		0.		
d Subtract line 6c from line 6b. Taxable	undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously				
			•		
	amount - see instructions		0.		
e Undistributed income for 2012, Subtract line			•		
4a from line 2a. Taxable amount - see instr.	4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2013. Subtract	f Undistributed income for 2013. Subtract				
lines 4d and 5 from line 1. This amount must	lines 4d and 5 from line 1. This amount must				
be distributed in 2014 101 , 773	be distributed in 2014				101,773.
7 Amounts treated as distributions out of	7 Amounts treated as distributions out of				•
corpus to satisfy requirements imposed by	corpus to satisfy requirements imposed by				
section 170(b)(1)(F) or 4942(g)(3) 0 .	section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2008	8 Excess distributions carryover from 2008				
not applied on line 5 or line 7	not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2014	9 Excess distributions carryover to 2014				
Subtract lines 7 and 8 from line 6a 0.	Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:	0 Analysis of line 9:				
a Excess from 2009	a Excess from 2009				
b Excess from 2010	b Excess from 2010				
c Excess from 2011	c Excess from 2011				
d Excess from 2012	d Excess from 2012				
e Excess from 2013	e Excess from 2013				

		Y FOUNDATIO			<u>6-1536434 </u>	Page 10
Part XIV Private Operating Fo	•			N/A		
1 a If the foundation has received a ruling or			1			
foundation, and the ruling is effective for		-	▶ ∟			
b Check box to indicate whether the foundary		ting foundation described		4942(j)(3) or	4942(j)(5)	
2 a Enter the lesser of the adjusted net	Tax year		Prior 3 years			
income from Part I or the minimum	(a) 2013	(b) 2012	(c) 2011	(d) 2010) (e) To	ital
investment return from Part X for						
each year listed		_				
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						
a "Assets" alternative test - enter:						
(1) Value of all assets						
(2) Value of assets qualifying				<u> </u>		
under section 4942(j)(3)(B)(i)						
b "Endowment" alternative test - enter						
shown in Part X, line 6 for each year listed						
c "Support" alternative test - enter:						
(1) Total support other than gross						
investment income (interest,]	
512(a)(5)), or royalties)					•	
(2) Support from general public						
		1				
section 4942(j)(3)(B)(iii)						
(3) Largest amount of support from						
an exempt organization						
(4) Gross investment income						
			if the founda	ntion had \$5,000	or more in ass	ets
at any time during th	ne year-see ins	tructions.)				
	•					
			ntributions received	by the foundation before	e the close of any tax	
year (but only if they have contributed m	ore than \$5,000). (See	section 507(d)(2))				
DR. HOLLY L SMITH RO						
			ı (or an equally large	portion of the ownersh	ıp of a partnership or	
NONE						
2 Information Regarding Contribution	on, Grant, Gift, Loa	n, Scholarship, etc., F	Programs:			
Check here X if the foundation or the foundation makes gifts, grants, etc. (ily makes contribution see instructions) to inc	s to preselected charitable dividuals or organizations	e organizations and e under other condition	does not accept unsolic ons, complete items 2a,	ited requests for funds b, c, and d.	. If
	omplete 3a, b, or c for the terrantive test relied upon: issets' alternative test relied upon: issets' alternative test - enter: 1) Value of all assets 2) Value of assets qualifying under section 4942()(3)(B)(i) indowment' alternative test - enter of of minimum investment return nown in Part X, line 6 for each year relief upport' 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()(3)(B)(ii) 2) Largest amount of support from an exempt organization as exempt organization (S) Gross investment income XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year-see instructions.) Information Regarding Foundation Managers: st 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 are (but only if they have contributed more than \$5,000). (See section 507(d)(2)) HOLLY L SMITH ROTH st 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 their entity) of which the foundation has a 10% or greater interest.					
b the form in which applications should be	submitted and inform	nation and materials they	should include:			
c Any submission deadlines:						
d Any restrictions or limitations on awards	, such as by geograph	ical areas, charitable field	s, kinds of institution	ns, or other factors:		
			·			
323601 10-10-13					Form 990-	PF (2013

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 Recipient Foundation Purpose of grant or Amount status of contribution any foundation manager or substantial contributor Name and address (home or business) recipient a Paid during the year GLENNER MEMORY CARE ÞС DAY PROGRAMS AND 3702 FOURTH AVENUE SUPPORT FOR FAMILIES SAN DIEGO, CA 92103 OF ALZHEIMER'S. 3,832, CANCER WELLNESS FOUNDATION ÞС CENTRAL ALABAMA CANCER 4145 CARMICHAEL ROAD PATIENT SUPPORT MONTGOMERY, AL 36106 500. ALZHEIMER'S ASSOCIATION РC PUBLIC SUPPORT FOR 14010 ROOSEVELT BOULEVARD SUITE 709 CHARITY WALK "WALK TO CLEARWATER FL 33762 END ALZHEIMER'S." 500. **▶** 3a 4.832. **b** Approved for future payment NONE Total **▶** 3b

Part XVI-A	Analysis o	f Income-Producing	Activities
------------	------------	--------------------	-------------------

Enter proce amounts unless atherwise indicated	Unrelated	business income	Excluded b	y section 512, 513, or 514	(0)
Enter gross amounts unless otherwise indicated. 1 Program service revenue:	(a) Business code	(b) Amount	(C) Exclusion code	(d) Amount	(e) Related or exempt function income
a	code				
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	100.	
4 Dividends and interest from securities			14	100. 49,113.	
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		V			· ····
8 Gain or (loss) from sales of assets other					
than inventory			18	146,687.	
9 Net income or (loss) from special events					
O Gross profit or (loss) from sales of inventory	-				
1 Other revenue:					
ā			 	-	
b		· · · · · · · · · · · · · · · · · · ·	+ + -		
c			 	-	
d			 		
2 Subtotal. Add columns (b), (d), and (e)		0.	 	195,900.	0.
3 Total. Add line 12, columns (b), (d), and (e)	L.		<u>'I</u>	13	
See worksheet in line 13 instructions to verify calculations)			·· <u> </u>	1337300.
		anliahmant of E	ramat D		
Part XVI-B Relationship of Activitie	s to the Accon	nplishment of E	xempt Pi	urposes	
Line No. Explain below how each activity for which i	ncome is reported in (column (e) of Part XVI-A	Contributed	importantly to the accomp	lishment of
the foundation's exempt purposes (other the foundation).	nan by providing fund	s for such purposes).			
					· · · · · · · · · · · · · · · · · · ·
	 -				
			-	 	
· · · · · · · · · · · · · · · · · · ·		-			
	· 				
	· · · · · · · · · · · · · · · · · · ·				
		· <u> </u>			
		<u> </u>			
		 			

Form 990-PF (2013) JAY L SMITH FAMILY FOUNDATION 46-1536434 Page 13 Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of

1	Did the or	ganization directly or indir	ectly engage in any	of the followin	g with any other organization	on described in secti	on 501(c) of	<u> </u>	Yes	No
					7, relating to political organ					
a	Transfers	from the reporting founda	ation to a noncharita	ble exempt or	ganization of:					
	(1) Cash							1a(1)		X
	(2) Other	assets						1a(2)		X
b	Other tran	sactions:								
	(1) Sales	of assets to a noncharital	ble exempt organizat	tion				1b(1)		X
	(2) Purch	nases of assets from a nor	ncharitable exempt o	organization				1b(2)		X_
	(3) Renta	al of facilities, equipment, i	or other assets					1b(3)		X
	(4) Reim	bursement arrangements						1b(4)		X
		s or loan guarantees						1b(5)		X
		rmance of services or me						1b(6)		X
		f facilities, equipment, mai	-		• •			1c		<u> </u>
d					dule. Column (b) should alv				sets,	
					ed less than fair market valu	ie in any transaction	or sharing arrangement, st	iow in		
۵١.		(h) Amount involved			avamat arganization	(4)				
a)L	ine no	(b) Amount involved	(c) Name of		exempt organization	(d) Description	of transfers, transactions, and s	haring ar	rangeme	nts
				N/A						
										
							7-71			
			-		******					
										
										
		·			·					
										
			· •		<u>-</u>					
										
							7.7.			
			7.11			-	···			
					W*L.					
2a	Is the four	ndation directly or indirect	ly affiliated with, or r	elated to, one	or more tax-exempt organi	zations described	, J. 11.			
		501(c) of the Code (other				zations accombed	Г	Yes	X] No
Ь		emplete the following sche		(0)) 0 000.			_		L-23	J 140
		(a) Name of org			(b) Type of organization	(c) Description of relationsh	ıp		
		N/A				``` <u>`</u>	· · · · · · · · · · · · · · · · · · ·	•		
					, , , , ,					
		V-2, 2.							-	
_						- '				
_					g accompanying schedules and			the IRS	discuss t	this
Sig	911	eller, it is true, correct, and com	nplete Declaration of pro	eparer (other than	taxpayer) is based on all inform	nation of which preparer	retur	n with th	e prepar (see ins	er
Не	re	Holly	Amotto/	Cott	> 5/14/14	PRESID		Yes] No
	Sign	ature of officer or trustee			Date	Title				
		Print/Type preparer's na	me	Preparer's si	gnature	Date	Check if PTIN			
_							self- employed			
Pa		CHRISTINE				05/13/14	P00	537	<u>690</u>	
	eparer	Firm's name ► JAC	KSON THOR	NTON &			Firm's EIN ▶ 63-10			
Us	e Only									
		Firm's address $ ightharpoons P$.			- 					
		MO:	NTGOMERY,	<u>AL</u> 36	101-0096		Phone no. (334)8			
						Fo	m 99 ()-PF	(2013)	

FORM 990-PF INTERE	ST ON SAVI	NGS ANI	TEMP	ORARY	CASH I	NVESTMENTS	STATE	MENT	1
SOURCE		F	REVENUE NET INV			(B) NVESTMENT NCOME	(C) ADJUSTED NET INCOM		3
BANK OF AMERICA, NA	L			100.	<u></u>	100.			
TOTAL TO PART I, LI	NE 3	_		100.		100.			
FORM 990-PF	DIVIDEND	S AND 1	INTERES	ST FRO	M SECU	RITIES	STATE	MENT	2
GROSS AMOUNT		G <i>P</i>	PITAL AINS IDENDS	RE	(A) VENUE BOOKS	(B) NET INVES MENT INCO		(C) DJUSTI T INCO	
BANK OF AMERICA,	76,059	. 2	26,946	. 49,113.		. 49,11	.3.		
TO PART I, LINE 4	76,059	. 2	26,946	· -	49,113	. 49,11	.3.		
FORM 990-PF		I	LEGAL 1	FEES			STATE	MENT	3
DESCRIPTION		(A) EXPENS PER BO	SES 1	(B NET IN MENT I	VEST-	(C) ADJUSTEI NET INCON		(D) ARITAI URPOSI	
MEMORY & DAY	_	1,	270.		0.				0.
TO FM 990-PF, PG 1,	LN 16A =	1,	270.		0.				0.
FORM 990-PF		ACCO	OUNTING	G FEES			STATE	MENT	4
DESCRIPTION		(A) EXPENS PER BO	SES 1	(B NET IN MENT I	VEST-	(C) ADJUSTEI NET INCOM		(D) ARITAI URPOSI	
JACKSON THORNTON		1,	315.		0.				0.
TO FORM 990-PF, PG	1, LN 16B	1,	315.		0.				0.

FORM 990-PF	OTHER PROFES	SIONAL FE	ES		STATEMENT 5	
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVE MENT INC				
BANK OF AMERICA	18,581.	18,	581.			0.
NEUBERGER BERMAN ADVISORY FEES	721.		721.			0.
TO FORM 990-PF, PG 1, LN 16C	19,302.	19,	302.			0.
FORM 990-PF	CORPORAT	E CHOCK			STATEMENT	6
	CORPORAT	E STOCK				
DESCRIPTION			вос	OK VALUE	FAIR MARKE	Т
EQUITIES		-	1	.,135,439.	1,352,7	49.
TOTAL TO FORM 990-PF, PART II, LINE 10B			1,135,439.		1,352,749.	
FORM 990-PF	OTHER INV	ESTMENTS			STATEMENT	7
DESCRIPTION		LUATION ETHOD	вос	OK VALUE	FAIR MARKE VALUE	т
FIXED INCOME HEDGE FUNDS		COST		381,978. 300,000.	386,5 327,9	34.
REAL ESTATE TOTAL TO FORM 990-PF, PART I		COST		781,978.	98,3	

46-1536		(c) Date acquired (mo., day, yr.)	OF 1 (d) Date sold (mo., day, yr.)	
	P D	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)	
	P D			
	D			
	1 E			
	D			
	D			
f BANK OF AMERICA g BANK OF AMERICA				
	D			
<u></u>				
hasis	(h)	Gain or (Ioss)		
fsale	(e) plus (f) minus (g)			
			<9,995.	
	· ·	·····	22,841.	
			<u> </u>	
			36,016.	
			0.	
		·	70,879.	
1,344.			26,946.	
1/00				
	(I) Los Gains (eycess d	ses (from col. (h))	col (k)	
	but n	but not less than "-0-")		
u,	<u>.</u>		<9,995.	
	 	·	22,841.	
			0.	
			0.	
			36,016.	
		•	0.	
			70,879.	
			26,946.	
		- .		
				
	,		146,687.	
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,				
	3	N/A		
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