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Form

990-PF

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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

OMB No 1545-0052

2013

Open to Public Inspection

For calendar year 2013, or tax year beginning 01-01-2013 , and ending 12-31-2013

Name of foundation THE SHARP FAMILY FOUNDATION INC		A Employer identification number 59-3302952	
Number and street (or P O box number if mail is not delivered to street address) 4264 MONTALVO COURT		B Telephone number (see instructions) (239) 566-8730	
City or town, state or province, country, and ZIP or foreign postal code NAPLES, FL 34109		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ☒ \$ 1,105,384		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	
J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)			

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) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)				
	2 Check ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	3	3	3	
	4 Dividends and interest from securities.	18,546	18,546	18,546	
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	82,485			
	b Gross sales price for all assets on line 6a 235,231				
	7 Capital gain net income (from Part IV, line 2)				
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	2,497	2,497	2,497	
	12 Total. Add lines 1 through 11	103,531	21,046	21,046	
	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule).	1,602			
	b Accounting fees (attach schedule).	750			
	c Other professional fees (attach schedule)	6,565			
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	236			
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings	11,739			
	22 Printing and publications	555			
	23 Other expenses (attach schedule).	78			
	24 Total operating and administrative expenses. Add lines 13 through 23	21,525	0		0
	25 Contributions, gifts, grants paid	90,000			90,000
	26 Total expenses and disbursements. Add lines 24 and 25	111,525	0		90,000
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-7,994			
	b Net investment income (if negative, enter -0-)		21,046		
	c Adjusted net income (if negative, enter -0-)			21,046	

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	2,753	136,055	136,055
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)		578,276	969,329
	c	Investments—corporate bonds (attach schedule).			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	15	Other assets (describe ▶ _____)			
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	2,753	714,331	1,105,384
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)		0	
Net Assets or Fund Balances		Foundations that follow SFAS 117, check here ▶ ☐ 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 ▶ ☒ and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds	107,741	107,741	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	-104,988	606,590	
	30	Total net assets or fund balances (see page 17 of the instructions)	2,753	714,331	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	2,753	714,331	

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	2,753
2	Enter amount from Part I, line 27a	2	-7,994
3	Other increases not included in line 2 (itemize) ▶ _____ 	3	719,572
4	Add lines 1, 2, and 3	4	714,331
5	Decreases not included in line 2 (itemize) ▶ _____	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	714,331

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				
(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				
b				
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))	
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any		
a				
b				
c				
d				
e				
2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }		2	
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8 }		3	

Part V

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

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

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

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

1 Enter the appropriate amount in each column for each year, see page 18 of 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		2,727	
2011		2,961	
2010		3,942	
2009		4,741	
2008		5,291	
2 Total of line 1, column (d).			2
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
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.			4 1,070,952
5 Multiply line 4 by line 3.			5
6 Enter 1% of net investment income (1% of Part I, line 27b).			6 210
7 Add lines 5 and 6.			7 210
8 Enter qualifying distributions from Part XII, line 4.			8 90,000

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 page 18 of the instructions)					
1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1		1	210		
Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)					
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		2	210		
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)					
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)				3	210
3 Add lines 1 and 2.				4	
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		5	210		
5 Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		6			
6 Credits/Payments					
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a				
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			
8 Enter any penalty for underpayment of estimated tax Check here ☐ if Form 2220 is attached		8			
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	210		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		10			
11 Enter the amount of line 10 to be Credited to 2014 estimated tax Refunded		11			

Part VII-A Statements Regarding Activities			
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		1a	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?		1b	No
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.			
c Did the foundation file Form 1120-POL for this year?.		1c	No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation \$ (2) On foundation managers \$			
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$			
2 Has the foundation engaged in any activities that have not previously been reported to the IRS?		2	No
If "Yes," attach a detailed description of the activities.			
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		3	No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?.		4a	No
b If "Yes," has it filed a tax return on Form 990-T for this year?.		4b	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?		5	No
If "Yes," attach the statement required by General Instruction T.			
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either - By language in the governing instrument, or - By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?		6	Yes
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.		7	Yes
8a Enter the states to which the foundation reports or with which it is registered (see instructions) FL			
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation .		8b	Yes
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? If "Yes," complete Part XIV		9	No
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses.		10	No

Part VII-A

Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address ▶N/A				
14	The books are in care of ▶W BARTON SHARP Telephone no ▶(239) 566-8730 Located at ▶4264 MONTALVO CT NAPLES FL ZIP +4 ▶34109			
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		
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	Yes	No
See 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.			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? ☐ Yes ☒ No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?. ☐ Yes ☒ No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ 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)?. ☐ Yes ☒ 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). ☐ Yes ☒ 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 page 20 of the instructions)?. . . Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐	1b		
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		
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?. ☐ Yes ☒ No If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions).	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?. ☐ Yes ☒ 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? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013.</i>).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?	4b		No

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)? (see instructions).

Yes

No

(5)

Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

Yes

No

b

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

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?

Yes

No

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

6a

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

Yes

No

b

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

6b

No

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?

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 (see instructions).

(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
See Additional Data Table				

2

Compensation of five highest-paid employees (other than those included on line 1—see instructions). 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.

Part VIII

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

(a) Name and address of each person paid more than \$50,000

NONE

(b) Type of service

(c) Compensation

Total number of others receiving over \$50,000 for professional services. 1

Part IX-A

Expenses

1

2

3

4

Part IX-B

Amount

1 N/A

2

All other program-related investments See page 24 of the instructions

3

Total. Add lines 1 through 3

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	1,034,978
b	Average of monthly cash balances.	1b	52,283
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	1,087,261
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	
2	Acquisition indebtedness applicable to line 1 assets.	2	
3	Subtract line 2 from line 1d.	3	1,087,261
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	16,309
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	1,070,952
6	Minimum investment return. Enter 5% of line 5.	6	53,548

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	53,548
2a	Tax on investment income for 2013 from Part VI, line 5.	2a	210
b	Income tax for 2013 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	210
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	53,338
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	53,338
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	53,338

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	90,000
b	Program-related investments—total from Part IX-B.	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
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	90,000
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions).	5	210
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	89,790
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				53,338
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only.				
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2013				
a From 2008.				
b From 2009.				
c From 2010.				
d From 2011.				
e From 2012.				
f Total of lines 3a through e.				
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 90,000				
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.				53,338
e Remaining amount distributed out of corpus	36,662			
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	36,662			
b Prior years' undistributed income Subtract line 4b from line 2b.				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d Subtract line 6c from line 6b Taxable amount—see instructions				
e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount—see instructions				
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) (see instructions).				
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions). . . .				
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	36,662			
10 Analysis of line 9				
a Excess from 2009. . . .				
b Excess from 2010. . . .				
c Excess from 2011. . . .				
d Excess from 2012. . . .				
e Excess from 2013. . . .	36,662			

Part XIV

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2013, enter the date of the ruling. . . .

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

	Tax year	Prior 3 years			(e) Total
	(a) 2013	(b) 2012	(c) 2011	(d) 2010	
2a Enter the lesser of the adjusted net income from Part I or the minimum 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					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test—enter					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.					
c "Support" alternative test—enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties).					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 Information Regarding Foundation Managers:

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

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

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

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

a The name, address, and telephone number of the person to whom applications should be addressed

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

c Any submission deadlines

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

Part XV

Supplementary Information (continued)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	90,000
b Approved for future payment				
Total			3b	

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2013)

Part XVII

Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

1

Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

a

Transfers from the reporting foundation to a noncharitable exempt organization of

1

Cash.

1a(1)

No

2

Other assets.

1a(2)

No

b

Other transactions

1

Sales of assets to a noncharitable exempt organization.

1b(1)

No

2

Purchases of assets from a noncharitable exempt organization.

1b(2)

No

3

Rental of facilities, equipment, or other assets.

1b(3)

No

4

Reimbursement arrangements.

1b(4)

No

5

Loans or loan guarantees.

1b(5)

No

6

Performance of services or membership or fundraising solicitations.

1b(6)

No

c

Sharing of facilities, equipment, mailing lists, other assets, or paid employees.

1c

No

d

If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.

(a) Line No	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements

2a

Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?

☐

Yes

☒

No

b

If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Sign Here

Signature of officer or trustee

2014-04-14

Date

Title

May the IRS discuss this return with the preparer shown below (see instr.)?

☒

Yes

☐

No

Paid Preparer Use Only

Print/Type preparer's name
LARRY A MCDONALD
CPA

Preparer's Signature

Date
2014-04-15

Check if self-employed ☐

PTIN
P00414995

Firm's name

MCDONALD & OSBORNE PA

Firm's EIN

Firm's address

9120 CORSEA DEL FONTANA WAY
NAPLES, FL 341094395

Phone no. (239) 254-8161

Form 990PF Part VIII Line 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 BARTON SHARP  4264 MONTALVO COURT NAPLES,FL 34109	PRESIDENT 1 00	0	0	0
PHYLLIS SHARP  4264 MONTALVO COURT NAPLES,FL 34109	SECRETARY/TR 4 00	0	0	0
MARGARET RUFFALO  1456 PARKSIDE DRIVE BOLINGBROOK,IL 60490	DIRECTOR 1 00	0	0	0
HARMON SHARP  318 NORLICK DRIVE BRYAN,OH 43506	VICE PRESIDE 1 00	0	0	0
CATHERINE SHARP  4264 MONTALVO COURT NAPLES,FL 34109	DIRECTOR 1 00	0	0	0

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
HOPE LODGE AMERICAN CANCER SOCIETY HOPE LODGE AMERICAN CANCER SOCIETY 12810 MAGNOLIA DR 12810 MAGNOLIA DR TAMPA,FL 33612	DONEE	PUBLIC	UNRESTRICTED	2,500
TRINITY EVANGELICAL LUTHERAN CHURCH TRINITY EVANGELICAL LUTHERAN CHURCH 509 CENTER STREET 509 CENTER STREET BRYAN,OH 43506	DONEE	PUBLIC	UNRESTRICTED	5,000
BREAST CANCER RESEARCH FOUNDATION BREAST CANCER RESEARCH FOUNDATION 60 EAST 56TH ST-8TH FLOOR 60 EAST 56TH ST-8TH FLOOR NEWYORK,NY 10022	DONEE	PUBLIC	UNRESTRICTED	10,000
BRYAN AREA FOUNDATION COMMUNITY FUN BRYAN AREA FOUNDATION COMMUNITY FD PO BOX 651 PO BOX 651 BRYAN,OH 43506	DONEE	PUBLIC	UNRESTRICTED	5,000
EQUESTRIAN CONNECTION NFP EQUESTRIAN CONNECTION NFP 872 S MILWAUKEE AVE 273 872 S MILWAUKEE AVE 273 LIBERTYVILLE,IL 60048	DONEE	PUBLIC	UNRESTRICTED	20,000
FRIENDS OF THE BRYAN LIBRARY FRIENDS OF THE BRYAN LIBRARY 107 EAST HIGH STREET 107 EAST HIGH STREET BRYAN,OH 43506	DONEE	PUBLIC	UNRESTRICTED	2,500
HUMANE SOCIETY NAPLES HUMANE SOCIETY NAPLES 370 AIRPORT PULLING RD N 370 AIRPORT PULLING RD N NAPLES,FL 34104	DONEE	PUBLIC	UNRESTRICTED	5,000
MOOSE CHARITIES MOOSE CHARITIES 155 S INTERNATIONAL DRIVE 155 S INTERNATIONAL DRIVE MOOSEHEART,IL 60539	DONEE	PUBLIC	UNRESTRICTED	2,500
NAMI COLLIER COUNTY NAMI COLLIER COUNTY 6216 TRAIL BLVD BLDG C 6216 TRAIL BLVD BLDG C NAPLES,FL 34108	DONEE	PUBLIC	UNRESTRICTED	1,000
NAPLES BOTANICAL GARDEN NAPLES BOTANICAL GARDEN 4820 BAYSHORE DRIVE 4820 BAYSHORE DRIVE NAPLES,FL 34112	DONEE	PUBLIC	UNRESTRICTED	5,000
NAPLES EQUESTRIAN CHALLENGE NAPLES EQUESTRIAN CHALLENGE 206 RIDGE DRIVE 206 RIDGE DRIVE NAPLES,FL 34108	DONEE	PUBLIC	UNRESTRICTED	6,000
PHEASANTS FOREVER PHEASANTS FOREVER 07492 COUNTY ROAD P50 07492 COUNTY ROAD P50 MONTPELIER,OH 43543	DONEE	PUBLIC	UNRESTRICTED	5,000
PROJECT HELP INC PROJECT HELP INC 3123 TERRACE AVENUE 3123 TERRACE AVE NAPLES,FL 34104	DONEE	PUBLIC	UNRESTRICTED	1,000
PLANNED PARENTHOOD OF COLLIER CNTY PLANNED PARENTHOOD OF COLLIER CNTY 1425 CREECH RD 1425 CREECH RD NAPLES,FL 34103	DONEE	PUBLIC	UNRESTRICTED	500
SHY WOLF SANCTUARY SHY WOLF SANCTUARY PO BOX 3032 PO BOX 3032 NAPLES,FL 34106	DONEE	PUBLIC	UNRESTRICTED	1,000
Total  3a				90,000

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
UNITY FAITHFUL FRIENDS UNITY FAITHFUL FRIENDS 1901 NW BLUE PARKWAY 1901 NW BLUE PARKWAY UNITY VILLAGE,MO 64065	DONEE	PUBLIC	UNRESTRICTED	2,500
VIETNAM VETERANS MEMORIAL FUND VIETNAM VETERANS MEMORIAL FUND 2600 VIRGINIA AVE NW 104 2600 VIRGINIA AVE NW 104 WASHINGTON,DC 20037	DONEE	PUBLIC	UNRESTRICTED	5,500
WILLIAMS COUNTY SPORTSMANS EDUCATIO WILLIAMS COUNTY SPORTSMANS EDUCATION 01521 NEY-WMS CTR ROAD 01521 NEY-WMS CTR ROAD BRYAN,OH 43506	DONEE	PUBLIC	UNRESTRICTED	10,000
Total  3a				90,000

TY 2013 Accounting Fees Schedule

Name: THE SHARP FAMILY FOUNDATION INC

EIN: 59-3302952

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX PREPARATION FEES	750			

TY 2013 Compensation Explanation**Name:** THE SHARP FAMILY FOUNDATION INC**EIN:** 59-3302952

Person Name	Explanation
WILLIAM BARTON SHARP	
PHYLLIS SHARP	
MARGARET RUFFALO	
HARMON SHARP	
CATHERINE SHARP	

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

TY 2013 Gain/Loss from Sale of Other Assets Schedule

Name: THE SHARP FAMILY FOUNDATION INC
EIN: 59-3302952

Name	Date Acquired	How Acquired	Date Sold	Purchaser Name	Gross Sales Price	Basis	Basis Method	Sales Expenses	Total (net)	Accumulated Depreciation
156 SHS AMGEN INC	2005-02	DONATION	2013-09		18,075	1,315			16,760	
45 SHS FLOWSERVE CORP	2012-12	DONATION	2013-09		2,848	2,162			686	
25 SHS LINDSAY CORP	2012-12	DONATION	2013-09		2,070	1,937			133	
70 SHS MEDIFAST INC	2012-12	DONATION	2013-09		1,850	1,786			64	
15 SHS NOVO NORDISK AS AD	2012-12	DONATION	2013-09		2,599	2,435			164	
100 SHS PRESTIGE BRANDS HLDG	2012-12	DONATION	2013-09		3,235	1,963			1,272	
100 SHS PRESTIGE BRANDS HLD	2012-12	DONATION	2013-09		3,235	1,962			1,273	
50 SHS STANDEX INTERNATIONAL	2012-12	DONATION	2013-09		2,873	2,499			374	
15 SHS TRANSDIGM GROUP INC	2012-12	DONATION	2013-09		2,141	2,009			132	
125 SHS WALKER & DUNLOP INC	2012-12	DONATION	2013-09		1,927	2,057			-130	
35 SHS ENSCO PLC SHS CL A I VLR192	2012-12	DONATION	2013-09		1,897	2,020			-123	
25 SHS ACTAVIS INC	2012-12	DONATION	2013-10		3,600	2,235			1,365	
200 SHS TANGOE INC	2013-10	PURCHASE	2013-11		3,418	4,976			-1,558	
800 SHS MICROSOFT CORP	2009-06	DONATION	2013-12		30,099	8,277			21,822	
75 SHS TRIMAS CORP	2013-10	DONATION	2013-12		2,664	2,015			649	
2,465 483 SHS VIRTUS EMERGING MKTS	2013-02	DONATION	2013-12		22,806	24,996			-2,190	
3 781 SHS VIRTUS EMERGING MKTS	2013-02	DONATION	2013-12		35	38			-3	
100 SHS F5 NETWORKS INC	2011-09	DONATION	2013-09		9,267	7,883			1,384	
65 SHS KIMBERLY CLARK CORP	2005-01	DONATION	2013-09		6,302	3,786			2,516	
200 SHS NIPPON TELEG & TELEP	2011-01	DONATION	2013-09		5,307	4,500			807	
299 SHS IBERDROLA S A SPONSO	2007-04	DONATION	2013-09		6,823	13,390			-6,567	
8 SHS IBERDROLA S A SPONSO	2011-01	DONATION	2013-09		183	229			-46	
300 SHS MYLAN INC	2011-10	DONATION	2013-09		11,437	5,925			5,512	
300 SHS GUANGSHEN RY LTD	2012-01	DONATION	2013-10		7,885	5,402			2,483	
1,710 376 SHS IVY HIGH INCOME FD	2005-01	DONATION	2013-11		15,000	14,471			529	
150 SHS BERKSHIRE HATHAWAY I B	2005-01	DONATION	2013-12		17,259	6,944			10,315	
280 SHS INFOSYS LTD	2005-01	DONATION	2013-12		15,253	9,812			5,441	
275 SHS 3M CO	2005-01	DONATION	2013-12		35,143	15,722			19,421	

TY 2013 Investments Corporate
Stock Schedule

Name: THE SHARP FAMILY FOUNDATION INC
EIN: 59-3302952

Name of Stock	End of Year Book Value	End of Year Fair Market Value
ACTAVIS PLC SHS	3,600	4,200
HOLLYSYS AUTOMATION TECH LTD	5,270	5,679
PERION NETWORK LTD	3,881	3,627
AMAZON COM INC	17,906	39,879
AMGEN INC	8,899	102,672
APPLE INC	20,448	28,051
BANK AMER CORP	23,320	7,785
BERKSHIRE HATHAWAY INC CL B	18,517	47,424
CR INDS HLDGS INC	2,002	2,330
CIGNA CORP	2,131	3,499
CHEVRON CORP	26,397	62,455
EDWARDS LIFESCIENCES CORP	3,124	3,288
EQUINIX INC	8,106	8,873
GILEAD SCIENCES INC	1,803	3,755
GOOGLE INC CL A	21,959	112,071
JP MORGAN CHASE & CO	20,343	29,240
LIFE TECHNOLOGIES CORP	5,624	7,580
MICROSOFT CORP	18,623	37,410
PANERA BREAD CO CL A	4,627	5,301
PHILIP MORRIS INTL INC	7,300	8,713
QUALCOMM INC	15,975	29,700
ROYAL DUTCH SHELL PLC REPSTG B	25,624	30,044
ROYAL DUTCH SHELL PLC REPSTG A	23,712	28,508
3M CO	17,152	42,075
UNION PACIFIC CORP	2,487	3,360
UNITEDHEALTH GROUP INC	4,825	7,530
IVY HIGH INCOME FUND CL A	92,200	94,005
PUTNAM EQUITY SPECTRUM FUND CL Y	49,579	78,422
VANGUARD HIGH YIELD CORP BOND FUND	111,714	117,948
JP MORGAN CHASE & CO ALERIAN MLP	11,128	13,905

TY 2013 Legal Fees Schedule

Name: THE SHARP FAMILY FOUNDATION INC

EIN: 59-3302952

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	1,602			

TY 2013 Other Expenses Schedule**Name:** THE SHARP FAMILY FOUNDATION INC**EIN:** 59-3302952

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXPENSES				
BANK CHARGES	60			
INVESTMENT FEES	18			

TY 2013 Other Income Schedule

Name: THE SHARP FAMILY FOUNDATION INC

EIN: 59-3302952

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
METLIFE 127785	2,497	2,497	2,497

TY 2013 Other Increases Schedule

Name: THE SHARP FAMILY FOUNDATION INC

EIN: 59-3302952

Description	Amount
DONATED COMMON STOCK	719,572

TY 2013 Other Professional Fees Schedule

Name: THE SHARP FAMILY FOUNDATION INC

EIN: 59-3302952

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
METLIFE FEES	6,565			

TY 2013 Taxes Schedule**Name:** THE SHARP FAMILY FOUNDATION INC**EIN:** 59-3302952

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAX PAID 036363	54			
FOREIGN TAX PAID 127785	182			