



See a Social Security Number? Say Something!
Report Privacy Problems to <https://public.resource.org/privacy>
Or call the IRS Identity Theft Hotline at 1-800-908-4490



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

Open to Public Inspection

For calendar year 2013 or tax year beginning

, and ending

Name of foundation
SARASOTA COUNTY FOUNDATION

Number and street (or P.O. box number if mail is not delivered to street address) Room/suite
1 WEST 4TH ST 4TH FL (MAC D4000-041)

City or town, state or province, country, and ZIP or foreign postal code
WINSTON-SALEM, NC 27101

G Check all that apply
☐ Initial return
☐ Final return
☐ Address change
☐ Initial return of a former public charity
☐ Amended return
☐ Name change

H Check type of organization
☒ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust
☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col (c), line 16)
\$ 1,420,905. (Part I, column (d) must be on cash basis)

J Accounting method:
☒ Cash
☐ Accrual
☐ Other (specify) _____

A Employer identification number
59-6169723

B Telephone number
941-361-5803

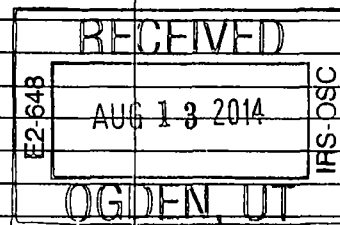
C If exemption application is pending, check here ☐

D 1 Foreign organizations, check here ☐
 2 Foreign organizations meeting the 85% test, check here and attach computation ☐

E If private foundation status was terminated under section 507(b)(1)(A), check here ☐

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received			N/A	
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	32,299.	32,299.		STATEMENT 1
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	3,305.			
	b Gross sales price for all assets on line 6a	266,502.			
	7 Capital gain net income (from Part IV, line 2)		3,305.		
	8 Net short-term capital gain				
Operating and Administrative Expenses	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less: Cost of goods sold				
	c Gross profit or (loss)				
	11 Other income				
	12 Total. Add lines 1 through 11	35,604.	35,604.		
	13 Compensation of officers, directors, trustees, etc.	20,752.	15,564.		5,188.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees				
	b Accounting fees	STMT 2 6,900.	0.		6,900.
	c Other professional fees				
	17 Interest				
	18 Taxes	STMT 3 676.	0.		0.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
22 Printing and publications					
23 Other expenses					
24 Total operating and administrative expenses. Add lines 13 through 23	28,328.	15,564.		12,088.	
25 Contributions, gifts, grants paid	49,600.			49,600.	
26 Total expenses and disbursements. Add lines 24 and 25	77,928.	15,564.		61,688.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	<42,324.>				
b Net investment income (if negative, enter -0-)		20,040.			
c Adjusted net income (if negative, enter -0-)			N/A		



SCANNED AUG 14 2014

6

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of year amounts only		Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing				
	2	Savings and temporary cash investments		34,729.	80,264.	80,264.
	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				
	7	Other notes and loans receivable ▶				
		Less: allowance for doubtful accounts ▶				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments - U.S. and state government obligations				
	b	Investments - corporate stock STMT 4		895,653.	1,022,294.	1,022,294.
	c	Investments - corporate bonds STMT 5		386,851.	316,245.	316,245.
	11	Investments - land, buildings, and equipment basis ▶				
	Less accumulated depreciation ▶					
12	Investments - mortgage loans					
13	Investments - other					
14	Land, buildings, and equipment: basis ▶					
	Less accumulated depreciation ▶					
15	Other assets (describe ▶ <u>PREPAID EXCISE TAX</u>)		2,503.	2,102.	2,102.	
16	Total assets (to be completed by all filers - see the instructions Also, see page 1, item 1)		1,319,736.	1,420,905.	1,420,905.	
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				
	22	Other liabilities (describe ▶)				
	23	Total liabilities (add lines 17 through 22)		0.	0.	
Net Assets or Fund Balances		Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31				
	24	Unrestricted		1,319,736.	1,420,905.	
	25	Temporarily restricted				
	26	Permanently restricted				
		Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 27 through 31				
	27	Capital stock, trust principal, or current funds				
	28	Paid-in or capital surplus, or land, bldg., and equipment fund				
	29	Retained earnings, accumulated income, endowment, or other funds				
	30	Total net assets or fund balances		1,319,736.	1,420,905.	
31	Total liabilities and net assets/fund balances		1,319,736.	1,420,905.		

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	1,319,736.
2	Enter amount from Part I, line 27a	2	<42,324.>
3	Other increases not included in line 2 (itemize) ▶ <u>UNREALIZED GAIN/BASIS ADJ MUT FD</u>	3	143,493.
4	Add lines 1, 2, and 3	4	1,420,905.
5	Decreases not included in line 2 (itemize) ▶	5	0.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,420,905.

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 LONG TERM CAP GAIN DISTRIBUTION WELLS FARGO	P		
b WELLS FARGO (SEE ATTACHED)	P		
c WELLS FARGO (SEE ATTACHED)	P		
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 12,895.			12,895.
b 85,544.		98,142.	<12,598.>
c 168,063.		165,055.	3,008.
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(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	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			12,895.
b			<12,598.>
c			3,008.
d			
e			

2 Capital gain net income or (net capital loss)	<div> If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 </div>	2	3,305.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):	<div> If gain, also enter in Part I, line 8, column (c) If (loss), enter -0- in Part I, line 8 </div>	3	N/A

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2012	64,896.	1,276,056.	.050857
2011	52,073.	1,288,443.	.040415
2010	51,760.	1,218,228.	.042488
2009	51,850.	1,063,688.	.048745
2008	77,403.	1,222,401.	.063320
2 Total of line 1, column (d)			2 .245825
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 .049165
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5			4 1,337,480.
5 Multiply line 4 by line 3			5 65,757.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 200.
7 Add lines 5 and 6			7 65,957.
8 Enter qualifying distributions from Part XII, line 4			8 61,688.

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

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b		1	401.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	401.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
5 Tax based on investment income Subtract line 4 from line 3. If zero or less, enter -0-		5	401.
6 Credits/Payments.			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	2,503.	
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	2,503.	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	2,102.	
11 Enter the amount of line 10 to be: Credited to 2014 estimated tax <input type="checkbox"/> 2,102. Refunded <input type="checkbox"/>	11	0.	

Part VII-A Statements Regarding Activities

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

N/A

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>WELLSFARGO.COM/PRIVATEFOUNDATIONGRANTS/SARASOTA</u>	13	X	
14	The books are in care of ► <u>WELLS FARGO BANK</u> Telephone no. ► <u>941-361-5803</u> Located at ► <u>1819 MAIN ST., SARASOTA, FL</u> ZIP+4 ► <u>34236</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year	15	N/A	
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ►	16	Yes	No X

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here ► <input type="checkbox"/>	1b	X
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?	1c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? If "Yes," list the years ► _____, _____, _____	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	N/A	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► _____, _____, _____	2b	
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If "Yes," did it have excess business holdings in 2013 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013)	N/A	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?	4b	X

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

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

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☒

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

N/A

☐ Yes ☐ No

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

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

☐ Yes ☒ No

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

6b

If "Yes" to 6b, file Form 8870

X

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

☐ Yes ☒ No

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

N/A

7b

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
WELLS FARGO BANK	TRUSTEE/TIME	VARIES		
1819 MAIN ST. SUITE 230	6.00	20,752.	0.	0.
SARASOTA, FL 34236				

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

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

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

0

Part VIII**Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors** (continued)**3** Five highest-paid independent contractors for professional services. If none, enter "NONE."

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

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

0

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

	Expenses
1 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

	Amount
1 N/A	
2	
All other program-related investments. See instructions.	
3	

Total. Add lines 1 through 3

0.

Form 990-PF (2013)

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	1,326,293.
b	Average of monthly cash balances	1b	29,052.
c	Fair market value of all other assets	1c	2,503.
d	Total (add lines 1a, b, and c)	1d	1,357,848.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	1,357,848.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	20,368.
5	Net value of noncharitable-use assets Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,337,480.
6	Minimum investment return Enter 5% of line 5	6	66,874.

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	66,874.
2a	Tax on investment income for 2013 from Part VI, line 5	2a	401.
b	Income tax for 2013. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	401.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	66,473.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	66,473.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	66,473.

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	61,688.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	61,688.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions Subtract line 5 from line 4	6	61,688.

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				66,473.
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2013:				
a From 2008	966.			
b From 2009				
c From 2010				
d From 2011				
e From 2012	5,417.			
f Total of lines 3a through e	6,383.			
4 Qualifying distributions for 2013 from Part XII, line 4. ► \$	61,688.			
a Applied to 2012, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2013 distributable amount				61,688.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a))	4,785.			4,785.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	1,598.			
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2012. Subtract line 4a from line 2a Taxable amount - see instr.			0.	
f Undistributed income for 2013. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2014				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	1,598.			
10 Analysis of line 9:				
a Excess from 2009				
b Excess from 2010				
c Excess from 2011				
d Excess from 2012	1,598.			
e Excess from 2013				

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient Name and address (home or business)	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
a Paid during the year				
CHILDREN FIRST 1723 N ORANGE SARASOTA, FL 34234	NONE	PUBLIC CHARITY	NOURISHING YOUNG BODIES TO LEARN	10,000.
FORTY CARROTS OF SARASOTA INC 1500 S TUTTLE AVENUE SARASOTA, FL 34239	NONE	PUBLIC CHARITY	PARENTING EDUCATION CLASSES FOR AT-RISK POPULATION	5,000.
INSTRIDE THERAPY INC 1629 RANCH RD NOKOMIS, FL 34275	NONE	PUBLIC CHARITY	SPECIAL RIDERS PROGRAM	3,600.
SAMARITAN COUNSELING SERVICES OF THE GULF COAST INC 3224 BEE RIDGE SARASOTA, FL 34239	NONE	PUBLIC CHARITY	CLIENT ASSISTANCE FUND	5,000.
TIDEWELL HOSPICE INC 5955 RAND BLVD SARASOTA, FL 34238	NONE	PUBLIC CHARITY	CHARITY CARE IN SARASOTA COUNTY	8,000.
Total	SEE CONTINUATION SHEET(S)			49,600.
b Approved for future payment				
NONE				
Total				0.

3 Grants and Contributions Paid During the Year (Continuation)

Total from continuation sheets

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
-------------	--	-----------	---

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
DIVIDENDS & INTEREST	32,299.	0.	32,299.	32,299.	
TO PART I, LINE 4	32,299.	0.	32,299.	32,299.	

FORM 990-PF	ACCOUNTING FEES	STATEMENT	2
-------------	-----------------	-----------	---

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEE	6,900.	0.		6,900.
TO FORM 990-PF, PG 1, LN 16B	6,900.	0.		6,900.

FORM 990-PF	TAXES	STATEMENT	3
-------------	-------	-----------	---

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FEDERAL EXCISE TAX	401.	0.		0.
FOREIGN TAX	275.	0.		0.
TO FORM 990-PF, PG 1, LN 18	676.	0.		0.

FORM 990-PF	CORPORATE STOCK	STATEMENT	4
-------------	-----------------	-----------	---

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE STOCK	1,022,294.	1,022,294.
TOTAL TO FORM 990-PF, PART II, LINE 10B	1,022,294.	1,022,294.

FORM 990-PF

CORPORATE BONDS

STATEMENT 5

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE BONDS	316,245.	316,245.
TOTAL TO FORM 990-PF, PART II, LINE 10C	316,245.	316,245.

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION
PART XV, LINES 2A THROUGH 2D

STATEMENT 6

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

APPLY ONLINE TO JOAN GREENWOOD
1819 MAIN ST. SUITE 230
SARASOTA, FL 34236

TELEPHONE NUMBER

941-361-5803

EMAIL ADDRESS

WELLSFARGO.COM/PRIVATEFOUNDATIONGRANTS/SARASOTA

FORM AND CONTENT OF APPLICATIONS

COPY ATTACHED

ANY SUBMISSION DEADLINES

JANUARY 15
JANUARY 15

RESTRICTIONS AND LIMITATIONS ON AWARDS

WHEN POSSIBLE AND PRACTICAL, RESTRICTED TO GEOGRAPHICAL AREA OF SARASOTA
COUNTY.

Statement of Capital Gains and Losses From Sales
 (Does not include capital gain distributions from mutual funds or CTF's - See Tax Transaction Detail)

SARASOTA CNTY FD
Trust Year Ending 12/31/2013

Type	Description	Date	Shares	Price	Fed Cost	State Cost	Fed Gain	State Gain	(Type)
131649709	CALVERT CAPTL ACCUMULATION-I 764								
Sold		03/07/13	70 264	2,500 00					
Acq		03/27/12	70 264	2,500 00	2,436 05	2,436 05	63.95	63 95	S
			Total for 3/7/2013		2,436.05	2,436 05	63 95	63 95	
20030N101	COMCAST CORP CLASS A								
Sold		02/01/13	122	4,688 50					
Acq		04/11/12	122	4,688 50	3,539 21	3,539 21	1,149.29	1,149 29	S
			Total for 2/1/2013		3,539 21	3,539 21	1,149 29	1,149 29	
406216101	HALLIBURTON CO								
Sold		08/23/13	4	193 60					
Acq		06/12/12	4	193 60	111.86	111 86	81.74	81.74	L
			Total for 8/23/2013		111.86	111 86	81 74	81.74	
406216101	HALLIBURTON CO								
Sold		09/05/13	5	249 65					
Acq		06/12/12	5	249 65	139.82	139.82	109 83	109 83	L
			Total for 9/5/2013		139 82	139 82	109 83	109.83	
411511306	HARBOR INTERNATION FD INST 2011								
Sold		03/07/13	46 649	3,000 00					
Acq		03/27/12	46.649	3,000 00	2,825 06	2,825 06	174.94	174 94	S
			Total for 3/7/2013		2,825 06	2,825.06	174.94	174 94	
44981V706	ING REAL ESTATE FUND CL-I 2190								
Sold		03/07/13	109 769	2,000 00					
Acq		12/12/08	109 769	2,000 00	932 66	932 66	1,067 34	1,067 34	L
			Total for 3/7/2013		932 66	932 66	1,067.34	1,067.34	
464287390	ISHARES S&P LATIN AMERICA 40								
Sold		07/12/13	205	7,289 67					
Acq		03/27/12	205	7,289 67	10,034 73	10,034 73	-2,745 06	-2,745 06	L
			Total for 7/12/2013		10,034 73	10,034 73	-2,745 06	-2,745.06	
4812C0803	JPMORGAN HIGH YIELD FUND SS 3580								
Sold		03/07/13	364 078	3,000 00					
Acq		03/27/12	364.078	3,000.00	2,887.14	2,887.14	112 86	112 86	S
			Total for 3/7/2013		2,887 14	2,887.14	112 86	112 86	
693390593	PIMCO MODERATE DURATION-INST 120								
Sold		02/08/13	921 659	10,000 00					
Acq		09/09/08	921 659	10,000 00	9,410.14	9,410 14	589.86	589 86	L
			Total for 2/8/2013		9,410 14	9,410.14	589 86	589 86	
693390593	PIMCO MODERATE DURATION-INST 120								
Sold		03/07/13	1381.215	15,000 00					
Acq		09/09/08	1381 215	15,000 00	14,102 20	14,102.20	897 80	897 80	L
			Total for 3/7/2013		14,102 20	14,102 20	897 80	897 80	

Statement of Capital Gains and Losses From Sales
 (Does not include capital gain distributions from mutual funds or CTF's - See Tax Transaction Detail)

2/27/2014 09:41:15

SARASOTA CNTY FD
Trust Year Ending 12/31/2013

Type	Description	Date	Shares	Price	Fed Cost	State Cost	Fed Gain	State Gain	(Type)
722005667	PIMCO COMMODITY REAL RET STRAT-I45								
Sold		03/07/13	305 81	2,000.00					
Acq		10/19/12	305 81	2,000 00	2,146 79	2,146.79	-146 79	-146 79	S
	Total for 3/7/2013				2,146 79	2,146 79	-146.79	-146 79	
722005667	PIMCO COMMODITY REAL RET STRAT-I45								
Sold		12/13/13	8526 099	47,149 33					
Acq		10/19/12	8526 099	47,149 33	59,853.21	59,853.21	-12,703.88	-12,703.88	L
	Total for 12/13/2013				59,853 21	59,853.21	-12,703 88	-12,703.88	
780905782	ROYCE SPECIAL EQUITY FD-INV 327								
Sold		03/07/13	110 767	2,500 00					
Acq		09/06/12	110 767	2,500 00	2,474 53	2,474 53	25 47	25 47	S
	Total for 3/7/2013				2,474 53	2,474 53	25 47	25 47	
780905782	ROYCE SPECIAL EQUITY FD-INV 327								
Sold		07/12/13	1590.218	39,834 96					
Acq		09/06/12	1590 218	39,834.96	35,525 47	35,525.47	4,309 49	4,309 49	S
	Total for 7/12/2013				35,525.47	35,525 47	4,309 49	4,309 49	
786514208	SAFEWAY INC NEW								
Sold		03/12/13	70	1,670 36					
Acq		04/11/12	70	1,670 36	1,405 59	1,405 59	264 77	264 77	S
	Total for 3/12/2013				1,405 59	1,405.59	264 77	264 77	
786514208	SAFEWAY INC NEW								
Sold		04/05/13	61	1,519 84					
Acq		04/11/12	61	1,519 84	1,224 87	1,224 87	294 97	294 97	S
	Total for 4/5/2013				1,224 87	1,224 87	294.97	294.97	
786514208	SAFEWAY INC NEW								
Sold		06/19/13	56	1,338 49					
Acq		11/26/12	13	310.72	214.54	214.54	96 18	96 18	S
Acq		04/11/12	43	1,027.77	863 44	863 44	164 33	164 33	L
	Total for 6/19/2013				1,077.98	1,077.98	260.51	260 51	
922031737	VANGUARD INFLAT-PROT SECS-ADM 5119								
Sold		07/10/13	1767.409	46,041 00					
Acq		02/08/13	1767 409	46,041 00	50,000 00	50,000 00	-3,959 00	-3,959 00	S
	Total for 7/10/2013				50,000 00	50,000 00	-3,959 00	-3,959 00	
922031869	VANGUARD INFLAT PROTECT SEC FD 119								
Sold		02/08/13	4210 526	60,631.57					
Acq		03/27/12	4210 526	60,631 57	60,000 00	60,000 00	631 57	631.57	S
	Total for 2/8/2013				60,000.00	60,000.00	631 57	631 57	
94985D582	WELLS FARGO INTL ADV FUND-IS 4705								
Sold		03/07/13	262 467	3,000.00					
Acq		01/20/05	230 465	2,634 22	2,694.14	2,694 14	-59.92	-59.92	L

EIN: 59-6169723

Wells Fargo

Page 3 of 3

Statement of Capital Gains and Losses From Sales
(Does not include capital gain distributions from mutual
funds or CTF's - See Tax Transaction Detail)

2/27/2014 09:41:15

Account Id:

SARASOTA CNTY FD
Trust Year Ending 12/31/2013

Type	Description	Date	Shares	Price	Fed Cost	State Cost	Fed Gain	State Gain	(Type)
94985D582	WELLS FARGO INTL ADV FUND-IS 4705								
Sold		03/07/13	262 467	3,000 00					
Acq		12/07/12	32 002	365 78	375 38	375 38	-9 60	-9 60	S
Total for 3/7/2013					3,069 52	3,069 52	-69 52	-69 52	
Total					263,196.83	263,196.83	-9,589 86	-9,589 86	
Total Proceeds:						Fed	State		
253,606 97					S/T Gain/Loss	3,008.10	3,008.10		
					L/T Gain/Loss	-12,597 96	-12,597 96		

ST PROCEEDS 168,063
ST COST 165,055
3,008 GAIN

LT PROCEEDS 85,544
LT COST 98,142
-12,598 LOSS



Sarasota County Foundation

Grant Application [Apply Online](#)

View Saved Applications [Sign On](#)

Attention assistive technology users

- [Overview](#)
- [Grant Guidelines](#)
- [Foundation Information](#)

Mission

The purpose of the foundation is to facilitate the administration of donations for charitable purposes in Sarasota County, Florida.

Application deadlines	January 15
Program areas	Arts, culture, and humanities Education Environment/animals Health Human services International/foreign affairs Public/society benefit Religion
States served	Florida
Geographic limitations	There are no geographic limitations; however, the trust primarily supports services and programs within Sarasota County, Florida.
Types of support	Program support and capital projects
Trustees	Wells Fargo Bank, N.A.

* You need Adobe® Reader® to read PDF files. [Download Adobe Reader](#) for free.

The information on this page is a summary only and may not reflect all or the latest applicable terms and conditions related to application and disposition of this Foundation's grant(s). In the event the information contained on this page differs from the Foundation's governing instrument, the governing instrument shall control

Educational scholarships

If you are an individual seeking scholarships, financial aid, or other direct financial assistance, the information available through this site will not assist you. We encourage you to consult the financial aid offices of specific educational institutions for help in understanding your options.

Wells Fargo Corporate Giving

The information found through this site does not include the many opportunities available for the communities and people served by Wells Fargo through its corporate philanthropy. For more details, please visit [Wells Fargo Corporate Giving](#)

Wells Fargo Philanthropic Services is part of Wells Fargo Wealth Management providing financial products and services through Wells Fargo Bank, N.A. and its various affiliates and subsidiaries.

Wells Fargo Bank, N.A., Member FDIC

Grants may be awarded to corporations, associations, or institutions whose purpose is to advance charitable, religious, educational, literary, or scientific goals, or to those organizations whose purpose is to distribute and apply such funds to any one or more such goals, whether located in the city and county of Sarasota or elsewhere. However, preference is given to services and programs within Sarasota County.

Requirements

- Organizations must qualify as exempt organizations under Section 501(c)(3) of the Internal Revenue Code.
- Applications must be submitted through the online grant application form or alternative accessible application designed for assistive technology users.

Limitations

The foundation generally does not fund:

- Endowments
- Travel
- Research
- Annual giving campaigns
- Completed projects
- Debt reduction
- Deficit financing
- Operating/program expenses
- Marketing materials and advertising
- Conferences, workshops, and seminars

Organizations may not apply to both the Sarasota County Foundation and the Cordelia Lee Beattie Foundation within the same year.

Average giving

Average grant size: \$5,000 to \$10,000

Average number of grants per year: 7

Average total giving per year: \$45,000

Application period and deadlines

Applications are accepted year-round. Applications must be submitted by January 15 to be reviewed at the February grant meeting.

Communications

Applicants will receive an automated email confirming their submission. Grant decisions are generally communicated by March 15 for applications received by the deadline.

Required agreements and reports

Except as otherwise specified when a grant is awarded, a progress report must be submitted within 6 months after receiving funds.

* You need Adobe® Reader® to read PDF files. [Download Adobe Reader](#) for free

The information on this page is a summary only and may not reflect all or the latest applicable terms and conditions re application and disposition of this Foundation's grant(s). In the event the information contained on this page differs from the Foundation's governing instrument, the governing instrument shall control.

Educational scholarships

If you are an individual seeking scholarships, financial aid, or other direct financial assistance, the information available through this site will not assist you. We encourage you to consult the financial aid offices of specific educational institutions for help in understanding your options.

Wells Fargo Corporate Giving

The information found through this site does not include the many opportunities available for the communities and people served by Wells Fargo through its corporate philanthropy. For more details, please visit [Wells Fargo Corporate Giving](#).

Wells Fargo Philanthropic Services is part of Wells Fargo Wealth Management providing financial products and services through Wells Fargo Bank, N.A. and its various affiliates and subsidiaries.

Wells Fargo Bank, N.A., Member FDIC

About the Foundation

Established in 1958 by Palmer First National Bank and Trust, the purpose of the foundation is to facilitate the administration of donations for charitable purposes in Sarasota County. Grants will be made to programs and capital projects within Sarasota County. The foundation does not make grants to capital campaigns or multi-year commitments.

* You need Adobe® Reader® to read PDF files. [Download Adobe Reader](#) for free.

The information on this page is a summary only and may not reflect all or the latest applicable terms and conditions related to application and disposition of this Foundation's grant(s). In the event the information contained on this page differs from the Foundation's governing instrument, the governing instrument shall control.

Educational scholarships

If you are an individual seeking scholarships, financial aid, or other direct financial assistance, the information available through this site will not assist you. We encourage you to consult the financial aid offices of specific educational institutions for help in understanding your options.

Wells Fargo Corporate Giving

The information found through this site does not include the many opportunities available for the communities and people served by Wells Fargo through its corporate philanthropy. For more details, please visit [Wells Fargo Corporate Giving](#).

Wells Fargo Philanthropic Services is part of Wells Fargo Wealth Management providing financial products and services through Wells Fargo Bank, N.A. and its various affiliates and subsidiaries.

Wells Fargo Bank, N.A. , Member FDIC

Contact Us**Wells Fargo****Philanthropic Services****Email:**

grantadministration@
wellsfargo.com

Phone: 1-888-234-1999

Fax: 1-877-746-5889

Technical Support

For technical questions about our online application, please call **1-888-235-4351**

© 1999 - 2014 Wells Fargo. All rights reserved. NMLSR ID 399801

Wells Fargo Philanthropic Services provides grant administration services for various foundations.

Guidelines, deadlines, and submission requirements are unique to each foundation.

Please visit our [website](#) for specific details prior to applying for a grant.

General Criteria, and Limitations

- Qualifying tax-exempt 501(c)(3) organizations are eligible to apply for grants consistent with the purposes of the foundation to which they are applying.
- Applicants that have previously received funds must be in good standing with respect to any required status reports or other conditions imposed before submitting a new proposal.

Communication

- Applicants will receive an email acknowledging receipt of their request.
- If a grant is approved, the grantee may be required to sign and return a grant agreement prior to receiving funds.
- Progress reports and completion reports may also be required for approved grants.

Tips

- Review the entire application and gather the necessary information before entering any answers.
- Compose long answers using word-processing software, and then copy/paste your answers into the application form.
- Please use correct grammar and do not use all capital letters.
- Do not close your browser window without saving your progress. Your information will be lost.
- Add grantadministration@wellsfargo.com to your address book to prevent aggressive spam filters from blocking our system-generated email replies.
- To return to a saved application, refer to the instructions in your account set-up email.
- If you are experiencing problems with your web browser, delete your history and cookies (in Internet Explorer, click on "Tools/Internet Options/Delete Browsing History").

Questions? Visit our website wellsfargo.com/privatefoundationgrants

or contact us at grantadministration@wellsfargo.com or 1-888-234-1999.

For technical support with this website please call 1-888-235-4351.

Foundation name

If you are looking for a specific foundation that is not listed, please contact us for assistance.

Federal taxpayer identification number

Federal tax identification number of tax-exempt organization applying for grant

Organization name per Internal Revenue Service records

Please note: Your organization may be required to submit additional information regarding its current tax-exempt status if it is otherwise deemed eligible to receive grant funds.

Fiscal agent or sponsor?

If any grant funds awarded would be used by an entity other than the tax-exempt organization identified above, describe the relationship between such other entity(ies) and the identified organization.

Tax exemption date

Date of most recent Internal Revenue Service determination letter recognizing organization's tax-exempt status

Entity type

Enter the Internal Revenue Code sections describing the organization's tax-exempt status as recognized by the Internal Revenue Service.

(for example, IRC Sections 501(c)(3) and 509(a)(2)).

Additional exemption status comments (optional)

Organization name

Enter the full legal name of the organization to be contacted regarding this application. If this name differs from the name on file with the IRS for the taxpayer identification number provided at the beginning of this application, please explain (e.g., "applicant organization is one of multiple chapters covered under a group tax exemption for the taxpayer ID provided").

Also Known As/Doing Business As

If the organization is known by other names, enter each such name below

Mailing address

City

State

Zip Code

Physical address

(if different from mailing address)

Main Phone

Website

Email address for general inquiries

Primary request contact

Prefix

Mr., Mrs., Ms., Dr., etc.

First name

Middle name/initial

Last name

Suffix

Title

Email address

Office phone

Mobile phone

Requested amount

Type of support

Request/project title

Request summary

Describe specific purposes for which any grant funds awarded from this foundation will be used (e.g., specific equipment, overall project funding, etc.).

This field is limited to 150 words. The word limit will be validated when you proceed to the next page.

Common goals

Why do you believe a grant to your organization would further this foundation's mission and priorities of our foundation?

This field is limited to 150 words. The word limit will be validated when you proceed to the next page

Demographics

Program area served

Geographical area served

Population served

Age group served

Gender served

Demographics comments (optional)

Describe the objectives of the project or program to be funded.

This field is limited to 150 words. The word limit will be validated when you proceed to the next page.

Describe the implementation plan for the project or program. Include at least three specific actions your organization will take in order to achieve results.

This field is limited to 150 words. The word limit will be validated when you proceed to the next page.

What criteria does (or will) your organization use to measure the success of the project or program?

(Example: Of the 400+ persons we serve/reach, we anticipate that approximately 200 will benefit in the manner described below, whereas without our program no more than 50 might reasonably have been expected to achieve the same result. This expectation is based on statistics from prior similar projects we have successfully conducted.) This field is limited to 150 words. The word limit will be validated when you proceed to the next page.

Collaboration

Briefly describe any formal or informal collaborative ventures your organization has established (or will establish) with other entities serving similar purposes that may be relevant to this grant request.

This field is limited to 150 words. The word limit will be validated when you proceed to the next page.

Project background

If this grant request relates to an ongoing project or program, how long has the project or program been operating?

This field is limited to 150 words. The word limit will be validated when you proceed to the next page.

Start date

If a grant is awarded, when does your organization anticipate being able to begin using the funds for the requested purpose?

End date

If a grant is awarded, when would the requested funds likely be exhausted?

Timeline

Provide any other relevant dates relating to the project or program for which grant funds would be used (milestones, interim check-ins, etc.).

Project finances

Project budget total (U.S. dollars)

(Format example: \$50,000)

Project budget detail

Provide a concise budget for the project listing major expense categories (if requesting general operating support, enter "not applicable").

Other project funding

List other sources that may fund this project. Include other pending grant requests, providing entity name, amount requested, and current status of each.

If these sources do not fully fund the project, what other sources of funding will your organization pursue?

Organization type

Select the classification that best describes your organization's primary purpose.

Mission

Briefly summarize your organization's current mission.

This field is limited to 100 words. The word limit will be validated when you proceed to the next page.

People

Board members

List your organization's current board members, officers, and trustees, as applicable. Please limit each entry to one line only. Extra blank lines are not needed between entries. **Example: Board Member's Full Name, Title at Your Organization, Name of Other Employer & Professional Title (if applicable)**

Number of paid staff, full-time

Number of paid staff, part-time

Number of volunteers

Current fiscal year finances

Total annual budget

Enter the total amount (in U.S. dollars) of your organization's annual budget for its current fiscal year.
(Format example: \$50,000)

Organization budget detail

Provide a brief budget for your current fiscal year that breaks down the above overall total by category.

(suggested categories: program services, salaries, fundraising, capital improvements, equipment, recruiting, etc.).

One budget item per line (Format example: \$50,000)

Budget changes

Summarize any significant changes in your current year budget since initially established.

What percentage of your budget is allocated to administrative expenses?

Prior fiscal year finances

Complete the following sections using information included on your organization's most recently filed tax return.

Enter "N/A" for items that are not applicable. If your organization does not file a tax return, use information from its most recent financial statement.

For fiscal year ending:

(Format example: mm/dd/yyyy)

If your organization did not file a tax return for its prior fiscal year, explain why:

Revenue

Contributions and grants

(Format example: \$50,000)

Program service revenue

(Format example: \$50,000)

Investment income

(Format example: \$50,000)

Other revenue

(Format example: \$50,000)

Total revenue

(Format example: \$50,000)

Expenses

Program services

(Format example: \$50,000)

Administration

(Format example: \$50,000)

Fundraising

(Format example: \$50,000)

Other expenses

(Format example: \$50,000)

Total expenses

(Format example: \$50,000)

Revenue less expenses

(Format example: \$50,000)

Net assets or fund balances

Total assets

(Format example: \$50,000)

Total liabilities

(Format example: \$50,000)

Net assets or fund balances

(Format example: \$50,000)

Additional finance-related comments (optional)

Application for Extension of Time To File an Exempt Organization Return

OMB No. 1545-1709

Department of the Treasury
Internal Revenue Service

► File a separate application for each return.

► Information about Form 8868 and its instructions is at www.irs.gov/form8868.

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒ **X**
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form).

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.

Electronic filing (e-file). You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit www.irs.gov/efile and click on e-file for Charities & Nonprofits.

Part I Automatic 3-Month Extension of Time. Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete

Part I only ☐

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

Type or print	Name of exempt organization or other filer, see instructions.	Enter filer's identifying number
	SARASOTA COUNTY FOUNDATION	Employer identification number (EIN) or 59-6169723
File by the due date for filing your return. See instructions.	Number, street, and room or suite no. If a P.O. box, see instructions. 1 WEST 4TH ST 4TH FL (MAC D4000-041)	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. WINSTON-SALEM, NC 27101	

Enter the Return code for the return that this application is for (file a separate application for each return)

04

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041 A	08
Form 4720 (individual)	03	Form 4720 (other than individual)	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

WELLS FARGO BANK

- The books are in the care of ► **1819 MAIN ST. - SARASOTA, FL 34236**

Telephone No. ► **941-361-5803**

Fax No. ►

- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ☐. If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for

- 1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until **AUGUST 15, 2014**, to file the exempt organization return for the organization named above. The extension is for the organization's return for
- ☒ calendar year **2013** or
- ☐ tax year beginning _____, and ending _____

- 2 If the tax year entered in line 1 is for less than 12 months, check reason. ☐ Initial return ☐ Final return
- ☐ Change in accounting period

3a If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	401.
b If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit	3b	\$	2,503.
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$	0.

Caution. If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.