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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

2014

Open to Public Inspection

For calendar year 2014, or tax year beginning 01-01-2014 , and ending 12-31-2014

Name of foundation Van Sloun Foundation		A Employer identification number 04-6691809	
Number and street (or P O box number if mail is not delivered to street address) PO Box 1161787E Scotch Pine Lane		B Telephone number (see instructions) (508) 748-1665	
City or town, state or province, country, and ZIP or foreign postal code Westport, MA 02791		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) \$ 8,800,969		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				
	4 Dividends and interest from securities.	217,200	217,200	217,200	
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	190,366			
	b Gross sales price for all assets on line 6a 766,609				
	7 Capital gain net income (from Part IV, line 2) . . .		200,214		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	407,566	417,414	217,200	
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	30,000			30,000
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	2,875	2,875	2,875	
	c Other professional fees (attach schedule)	44,443	44,443	44,443	
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	20,741	3,375	3,375	70
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings	11,437			
	22 Printing and publications				
	23 Other expenses (attach schedule)	802	52	52	
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	110,298	50,745	50,745	30,070
	25 Contributions, gifts, grants paid	403,000			403,000
	26 Total expenses and disbursements. Add lines 24 and 25	513,298	50,745	50,745	433,070
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-105,732			
	b Net investment income (if negative, enter -0-)		366,669		
	c Adjusted net income (if negative, enter -0-)			166,455	

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	916,971	352,338	352,388
	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	901	901	
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	7,954,472	8,448,581	8,448,581
	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)	8,872,344	8,801,820	8,800,969	
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			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	8,872,344	8,801,820	
	30	Total net assets or fund balances (see instructions)	8,872,344	8,801,820	
31	Total liabilities and net assets/fund balances (see instructions) . . .	8,872,344	8,801,820		

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 8,872,344
2	Enter amount from Part I, line 27a	2 -105,732
3	Other increases not included in line 2 (itemize) ▶ _____	3 35,208
4	Add lines 1, 2, and 3	4 8,801,820
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 8,801,820

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	200,214
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	-3,920

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))		
2013	406,075	8,452,979	0 04804		
2012	391,165	7,956,955	0 04916		
2011	396,034	7,844,210	0 05049		
2010	361,951	7,290,580	0 04965		
2009	298,125	6,422,213	0 04642		
2 Total of line 1, column (d).				2	0 24375
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years				3	0 04875
4 Enter the net value of noncharitable-use assets for 2014 from Part X, line 5.				4	8,897,965
5 Multiply line 4 by line 3.				5	433,785
6 Enter 1% of net investment income (1% of Part I, line 27b).				6	3,667
7 Add lines 5 and 6.				7	437,452
8 Enter qualifying distributions from Part XII, line 4.				8	433,070
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			
b		Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b		17,333	
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	
3		Add lines 1 and 2.		37,333	
4		Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	
5		Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		57,333	
6		Credits/Payments			
a		2014 estimated tax payments and 2013 overpayment credited to 2014		6a	11,200
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.		711,200	
8		Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached.		8	
9		Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	
10		Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		103,867	
11		Enter the amount of line 10 to be Credited to 2015 estimated tax ☐ 3,867 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 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		No
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) ☐ MA				
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 2014 or the taxable year beginning in 2014 (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 American Research & Management Telephone no (508) 748-1611 Located at 145 Front Street Marion MA ZIP +4 02738			
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 2014, 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 FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) 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 instructions)? Organizations relying on a current notice regarding disaster assistance check here.	1b		No
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2014?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? If "Yes," list the years 20 , 20 , 20 , 20 Yes 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).	2b		No
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 2014 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 2014.).	3b		No
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 2014?	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))?

YesNo

(2)

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

YesNo

(3)

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

YesNo

(4)

Provide a grant to an organization other than a charitable, etc , organization described in section 4945(d)(4)(A)? (see instructions).

YesNo

(5)

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

YesNo

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

No

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?

YesNo

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?

YesNo

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?

YesNo

b

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

7b

No

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.

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Part VIII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services.		

Part IX-A

Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1	
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See instructions.	
3	
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	8,400,778
b	Average of monthly cash balances.	1b	632,689
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	9,033,467
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	
3	Subtract line 2 from line 1d.	3	9,033,467
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	135,502
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	8,897,965
6	Minimum investment return. Enter 5% of line 5.	6	444,898

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	444,898
2a	Tax on investment income for 2014 from Part VI, line 5.	2a	7,333
b	Income tax for 2014 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	7,333
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	437,565
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	437,565
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	437,565

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	433,070
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	433,070
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	
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	433,070

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 2013	(c) 2013	(d) 2014
1 Distributable amount for 2014 from Part XI, line 7				437,565
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only.			14,273	
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2014				
a From 2009.				
b From 2010.				
c From 2011.				
d From 2012.				
e From 2013.				
f Total of lines 3a through e.				
4 Qualifying distributions for 2014 from Part XII, line 4 ▶ \$ 433,070				
a Applied to 2013, but not more than line 2a			14,273	
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2014 distributable amount.				418,797
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b.				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d Subtract line 6c from line 6b Taxable amount—see instructions				
e Undistributed income for 2013 Subtract line 4a from line 2a Taxable amount—see instructions				
f Undistributed income for 2014 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015				18,768
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).				
8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions). . .				
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9				
a Excess from 2010. . . .				
b Excess from 2011. . . .				
c Excess from 2012. . . .				
d Excess from 2013. . . .				
e Excess from 2014. . . .				

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

1a

If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2014, enter the date of the ruling.

b

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

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed.	Tax year	Prior 3 years			(e) Total
		(a) 2014	(b) 2013	(c) 2012	(d) 2011	
b	85% of line 2a					
c	Qualifying distributions from Part XII, line 4 for each year listed.					
d	Amounts included in line 2c not used directly for active conduct of exempt activities.					
e	Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c.					
3	Complete 3a, b, or c for the alternative test relied upon					
a	"Assets" alternative test—enter					
	(1) Value of all assets					
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b	"Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.					
c	"Support" alternative test—enter					
	(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties).					
	(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
	(3) Largest amount of support from an exempt organization					
	(4) Gross investment income					

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

1

Information Regarding Foundation Managers:

a

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

b

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

2

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

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

a

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

Neil Van Sloun
Scotch Pine Lane PO Box 116
Westport, MA 02791
(508) 636-4573

b

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

Letter requesting funds

c

Any submission deadlines

None

d

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

None

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	403,000
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** (2014)

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?

(1) Cash.

(2) Other assets.

- (1)** Sales of assets to a noncharitable exempt organization.
- (2)** Purchases of assets from a noncharitable exempt organization.
- (3)** Rental of facilities, equipment, or other assets.
- (4)** Reimbursement arrangements.
- (5)** Loans or loan guarantees.
- (6)** Performance of services or membership or fundraising solicitations.

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.

[illegible]

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

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

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.		
Sign Here	***** _____ Signature of officer or trustee	2015-05-06 _____ 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 Joseph L McArdle Jr CPA	Preparer's Signature	Date	Check if self-employed ☒	PTIN P00146401
	Firm's name ☒ BENOIT & MCARDLE PC			Firm's EIN ☒	
	Firm's address ☒ 240 WAREHAM RD - P O BOX 1037 MARION, MA 027381037			Phone no (508) 748-1611	

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
ERIC H STRAND	Trustee 0 00	0		
PO BOX 1031 MARION,MA 02738				
Michelle Adesso	Trustee 0 00	0		
798 Division Street S Dartmouth,MA 02748				
DENNIS VAN SLOUN	Trustee 0 00	0		
17230 CLEAR SPRING LANE MINNETONKA,MN 55345				
JOSEPH VAN SLOUN	Executive Direc 10 00	30,000		
3527 JIDANA LANE MINNETONKA,MN 55345				
DAVID B TITUS	Trustee 0 00	0		
PO Box 1219 MARION,MA 02738				
EVERETT M DAVIS	Director 0 00	0		
43 COVE CIRCLE MARION,MA 02738				
NANCY VAN SLOUN	Director 0 00	0		
30 WEST POINT DRIVE TONKA BAY,MN 55331				

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>				
Evelyn McLaughlin 17032 Prospect Place Wayzata, MN 55391	NONE	PRVT	Scholarship	1,000
Amanda Nichols 183 Beeden Road E Freetown, MA 02717	NONE	PRVT	Scholarship	1,000
Connecticut College 270 Mohegan Ave New London, CT 06320	NONE	PRVT	Ann C Wheeler Endowment	1,000
Jessica Zuber 1221 Reed Road Dartmouth, MA 02747	NONE	PRVT	Scholarship	1,000
Nicholas Anderson 8 Field Stone Drive Westport, MA 02790	NONE	PRVT	Scholarship	1,000
Westport Fishermen's Association PO Box 83 Westport Point, MA 02791	NONE	PRVT	UNRESTRICTED	1,000
DUCKS UNLIMITED One Waterfowl Way Memphis, TN 38120	NONE	Public	UNRESTRICTED	15,000
MORRIS ANIMAL FOUNDATION 10200 East Girard Suite B 430 Denver, CO 80231	NONE	Public	UNRESTRICTED	30,000
MONTANA STATE UNIVERSITY FND PO Box 173150 Bozeman, MT 59717	NONE	PRVT	Horticultural Department	4,000
BEREA COLLEGE 101 Chestnut Street Berea, KY 40403	NONE	PRVT	UNRESTRICTED	10,000
Westport River Watershed Alliance 1151 Main Road Westport, MA 02790	NONE	Public	UNRESTRICTED	10,000
FRONTIER NURSING 195 School Street Hyden, KY 41749	NONE	PRVT	UNRESTRICTED	15,000
Minnesota State Horticultural Socie 2705 Lincoln Dr Roseville, MN 55113	NONE	Public	UNRESTRICTED	1,200
NEADS 305 Redemption Rock Trail Princeton, MA 01541	NONE	Public	UNRESTRICTED	1,000
FRIENDS ACADEMY 1088 Tucker Road North Dartmouth, MA 02747	NONE	Public	Girls Sports Programand Literacy Development, Literacy development	14,000
Total  3a				403,000

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
Perkins School for the Blind 175 N Beacon St Watertown, MA 02472	NONE	Public	UNRESTRICTED	10,000
Alice Lloyd College 100 Purpose Road Pippa Passes, KY 41844	NONE	PRVT	UNRESTRICTED	30,000
Fred Hutchinson Cancer Research Cen 1100 Fairview Ave N Seattle, WA 98109	NONE	Public	UNRESTRICTED	20,000
Demarest Lloyd Center 430 Potomska Road Dartmouth, MA 02748	NONE	Public	UNRESTRICTED	5,000
Student Conservation Association 689 River Road Charlestown, NH 03603	NONE	Public	UNRESTRICTED	10,000
BOWDOIN COLLEGE 5000 South St Brunswick, ME 04011	NONE	PRVT	UNRESTRICTED	2,000
TABOR ACADEMY Front Street Marion, MA 02738	NONE	PRVT	UNRESTRICTED	1,500
Westport Land Conservation Trust PO Box 3975 830 Drift Rd Westport, MA 02790	NONE	Public	UNRESTRICTED	1,000
Animal Rescue League of Greater Fal 474 Durfee Street Fall River, MA 02720	NONE	Public	UNRESTRICTED	35,000
Trustees University of Pennsylvania 3451 Walnut Street Philadelphia, PA 19104	NONE	Public	UNRESTRICTED	30,000
Cummings School of VetMedicin 200 Westboro Road North Grafton, MA 01536	NONE	Public	Unrestricted	10,000
The Raptor Center 1920 Fitch Avenue St Paul, MN 55108	None	Public	Unrestricted	11,000
Minnesota Landscape Arboretum Found 3675 Arboretum Drive Chaska, MN 55318	None	Public	Unrestricted	13,000
Pamela Katten Foundation 525 W Monroe Chicago, IL 60661	None	PRVT	Unrestricted	500
Vested Interest in K-9's PO Box 9 East Taunton, MA 02718	None	Public	Purchase bullet proof vest for police dog	2,000
Total  3a				403,000

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>				
Massachusetts Audubon Society 208 S Great Road Lincoln, MA 01773	None	Public	Unrestricted	10,000
REDWOOD CITY HERITAGE ASSOCIATION 627 Hamilton Street Redwood City, CA 94063	None	Public	Unrestricted	1,000
Star Kids of New Bedford PO Box 79198 Dartmouth, MA 02747	None	Public	Unrestricted	6,000
Univ of Minnesota Masonic Cancer Ct 425 E River Pkwy Minneapolis, MN 55455	None	Public	Unrestricted	10,000
Dorcas Widows Fund 574 Prairie Center Drive 135-109 Eden Prairie, MN 55344	None	Public	Unrestricted	2,500
BLITHEWOLD INC 101 Ferry Road Bristol, RI 02809	None	Public	Unrestricted	10,000
Bentley College 175 Forest Street Waltham, MA 02452	None	PRVT	Unrestricted	1,000
Guiding Eyes for the Blind 611 Granite Springs Road Yorktown Heights, NY 10598	None	Public	Unrestricted	5,000
Guide Dog Foundation for the Blind 70 Audubon Street New Haven, CT 06510	None	Public	Unrestricted	5,000
Camp Sunshine 35 Acadia Road Casco, ME 04015	None	Public	Unrestricted	9,000
The Shwartz Center for Children 1 Posa Place Dartmouth, MA 02747	None	Public	Unrestricted	10,000
Westport Youth Athletic Association PO Box 1567 Westport, MA 02790	None	Public	Unrestricted	3,000
America's Vet Dogs 371 East Jericho Turnpike Smithtown, NY 11787	None	Public	Unrestricted	15,500
Watoto Trust Schadualistri Lenk, Schadaulistri Lenk 3775 SZ	None	PRVT	Unrestricted	500
Danielle B Rageotte Paul Smiths College PO Box 265 Paul Smiths, NY 12970	None	PRVT	Scholarship	1,000
Total  3a				403,000

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>				
Katherine Cummings 121 County Road EFreetown, MA 02176	None	PRVT	Scholarship	1,000
Joshua C Conway 3622 Therese Street Wayzata, MN 55391	None	PRVT	Scholarship	1,000
Loren Arena 998 Faunce Corner Road North Dartmouth, MA 02747	None	PRVT	Scholarship	1,000
Horticultural Reseach Institute 1200 G Street NW Suite 800 Washington, DC 20005	None	Public	Unrestricted	1,000
University of Minnesota Foundation 200 Oak Street SE Suite 500 Minneapolis, MN 55455	None	PC	Vet School Scholarship	1,000
Dana Hall School 45 Dana Road Wellesley, MA 02482	None	PC	Unrestricted	500
New Bedford Symphony Orchestra PO Box 2053 New Bedford, MA 02741	None	PC	Unrestricted	500
Sippican Choral Society PO Box 709 Marion, MA 02738	None	PC	Unrestricted	500
Canine Lymphoma Education Awareness 19223 Prairie Street Northridge, CA 91324	None	PC	Animal welfare	6,000
Choate Rosemary Hall 333 Christian Street Wallingford, CT 06492	None	PC	Annual fund	1,000
Marion Art Center 80 Pleasant Street Marion, MA 02738	None	PC	Unrestricted	4,000
Minnesota Land Trust 2356 University Ave W Suite 240 St Paul, MN 55114	None	PC	Unrestricted	1,000
Yankee Golden Retriever Rescue PO Box 808 Hudson, MA 01749	None	PC	Unrestricted	4,000
The Smile Train PO Box 96231 Washington, DC 20090	None	PC	Unrestricted	500
Hmong American Farmers Association 941 Lafond Avenue West Suite 100 Saint Paul, MN 55104	None	PC	Unrestricted	500
Total  3a				403,000

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>				
Carver County Historical Society 555 W1st St Waconia, MN 55387	None	PC	Unrestricted	300
Missions Inc 3409 East Medicine Lake Blvd Plymouth, MN 55441	None	PC	Unrestricted	500
MN Adult Teen Challenge 1619 Portland Ave S Minneapolis, MN 55404	None	PC	Unrestricted	500
Tobey Hospital 43 High Street Wareham, MA 02571	None	PC	Unrestricted	1,500
Total  3a				403,000

TY 2014 Accounting Fees Schedule

Name: Van Sloun Foundation

EIN: 04-6691809

Software ID: 14000265

Software Version: 2014v5.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Benoit & McArdle	2,875	2,875	2,875	0

TY 2014 Investments Corporate
Stock Schedule

Name: Van Sloun Foundation
EIN: 04-6691809
Software ID: 14000265
Software Version: 2014v5.0

Name of Stock	End of Year Book Value	End of Year Fair Market Value
ANALOG DEVICES	127,696	127,696
JOHNSON & JOHNSON	115,026	115,026
MERCK	85,185	85,185
FISERV	212,910	212,910
PROCTER & GAMBLE	109,308	109,308
DOVER	121,924	121,924
GENERAL ELECTRIC	144,039	144,039
PEPSICO	179,664	179,664
ENCANA	99,864	99,864
PLUM CREEK TIMBER CO	77,022	77,022
Automatic Data Processing	125,055	125,055
Church & Dwight	181,263	181,263
TransCanada	171,850	171,850
NOVARTIS AG SPONSORED ADR	129,724	129,724
EXXON MOBIL	157,165	157,165
Adobe Systems	109,050	109,050
Glacier Bancorp	222,160	222,160
John Wiley Class A	136,252	136,252
Chevron Texaco	157,052	157,052
Illinois Toolworks	189,400	189,400
Occidental Pete	84,641	84,641
WATERS CORPORATION	146,536	146,536
J G BOSWELL	214,875	214,875
REALTY INCOME CORP.	124,046	124,046
KEWEENAU LAND ASSN LTD	59,400	59,400
Stryker Corp	160,361	160,361
Altria Group Inc	98,540	98,540
First Potomac Realty	86,520	86,520
Goldman Sachs	101,454	101,454
Philip Morris International	73,305	73,305

Name of Stock	End of Year Book Value	End of Year Fair Market Value
Cenovus Energy	113,410	113,410
Imperial Oil	107,575	107,575
EMC	89,220	89,220
Safeguard Scientifics	99,100	99,100
Nestle S A ADR	109,425	109,425
Private Bancorp	38,257	38,257
Leucadia National		
Northern Oil and Gas		
Royal Dutch Shell	104,340	104,340
Deere and Company	132,705	132,705
E I du Pont de Nemours	147,880	147,880
Portfolio Recovery Associates	133,239	133,239
The Charles Schwab Corp	120,760	120,760
Wells Fargo Pref Stock	262,680	262,680
Dodge & Cox Income Fund	791,743	791,743
Apple Computer Inc	110,380	110,380
M & T Capital Trust		
Metlife Inc Pfd	51,600	51,600
Atwood Oceanics Inc		
Oceaneering Intl Inc		
Duke Realty Pfd		
Vornado Realty Pfd	51,200	51,200
Conestoga Small Cap	109,211	109,211
Walthausen Small Cap	97,551	97,551
Vanguard St Investment Grade Admiral	1,339,816	1,339,816
California Resources Corp	2,314	2,314
Delaware Emerging Markets	86,353	86,353
Cohen & Steers Pref Securities Income	348,535	348,535

TY 2014 Other Expenses Schedule**Name:** Van Sloun Foundation**EIN:** 04-6691809**Software ID:** 14000265**Software Version:** 2014v5.0

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ADR fees	52	52	52	
Insurance	750			

TY 2014 Other Increases Schedule

Name: Van Sloun Foundation

EIN: 04-6691809

Software ID: 14000265

Software Version: 2014v5.0

Description	Amount
Unrealized Gains and Losses	35,208

TY 2014 Other Professional Fees Schedule**Name:** Van Sloun Foundation**EIN:** 04-6691809**Software ID:** 14000265**Software Version:** 2014v5.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
American Research & Management	44,443	44,443	44,443	0

TY 2014 Taxes Schedule**Name:** Van Sloun Foundation**EIN:** 04-6691809**Software ID:** 14000265**Software Version:** 2014v5.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Commonwealth of Massachusetts	70			70
Federal excise taxes	17,296			
Foreign taxes	3,375	3,375	3,375	