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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 Evergreen Foundation Inc		A Employer identification number 06-1482180	
% GEORGE S BROWNELL		B Telephone number (see instructions) (920) 751-3912	
Number and street (or P O box number if mail is not delivered to street address) c/o George S Brownell 3139 Westfield Ridge Suite		C If exemption application is pending, check here <input type="checkbox"/>	
City or town, state or province, country, and ZIP or foreign postal code Neenah, WI 54956		D 1. Foreign organizations, check here <input type="checkbox"/>	
G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity		2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
<input type="checkbox"/> Final return <input type="checkbox"/> Amended return		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
<input type="checkbox"/> Address change <input type="checkbox"/> Name change		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation			
<input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation			
I Fair market value of all assets at end of year (from Part II, col. (c), line 16)▶\$ 2,434,465		J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> 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)	0			
	2 Check <input 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.	62,767	62,767		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10 _____	105,161			
	b Gross sales price for all assets on line 6a _____ 711,175				
	7 Capital gain net income (from Part IV, line 2) . . .		105,161		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	167,928	167,928		
	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	4,497	0	0	4,497
	c Other professional fees (attach schedule)	12,826	12,826		
	17 Interest				
	18 Taxes (attach schedule) (see instructions) . . .	524	524		
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	15			
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	17,862	13,350	0	4,497
	25 Contributions, gifts, grants paid	102,300			102,300
	26 Total expenses and disbursements. Add lines 24 and 25	120,162	13,350	0	106,797
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	47,766			
	b Net investment income (if negative, enter -0-)		154,578		
	c Adjusted net income (if negative, enter -0-)				

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	22,526	214	214
	2	Savings and temporary cash investments	89,106	261,341	261,341
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	1,542,346	<input checked="" type="checkbox"/> 1,545,738	2,055,195
	c	Investments—corporate bonds (attach schedule).	174,542	<input checked="" type="checkbox"/> 68,993	72,091
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	16,201	<input checked="" type="checkbox"/> 16,201	45,624
	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)	1,844,721	1,892,487	2,434,465	
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 ▶ <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds	1,844,721	1,892,487	
	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 (see instructions)	1,844,721	1,892,487	
31	Total liabilities and net assets/fund balances (see instructions)	1,844,721	1,892,487		

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)	11,844,721
2	Enter amount from Part I, line 27a	247,766
3	Other increases not included in line 2 (itemize) ▶ _____	3
4	Add lines 1, 2, and 3	41,892,487
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	61,892,487

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)
1 a	GLENMEDE - SEE ATTACHED STATEMENT			
b	GLENMEDE - SEE ATTACHED STATEMENT			
c	RAYMOND JAMES - SEE ATTACHED STATEMENT			
d	CAPITAL GAIN DIVIDENDS	P		
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 113,021		134,809	-21,788
b 482,999		365,938	117,061
c 108,749		105,267	3,482
d			6,406
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			-21,788
b			117,061
c			3,482
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	105,161
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8	}	3	

Part V

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

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

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

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

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

1 Enter the appropriate amount in each column for each year, see 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	63,550	2,186,048	0 029071
2012	50,501	1,446,349	0 034916
2011	48,880	1,039,011	0 047045
2010	46,100	1,029,361	0 044785
2009	53,354	927,678	0 057513

2	Total of line 1, column (d).	2	0 21333
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 042666
4	Enter the net value of noncharitable-use assets for 2014 from Part X, line 5.	4	2,406,196
5	Multiply line 4 by line 3.	5	102,663
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	1,546
7	Add lines 5 and 6.	7	104,209
8	Enter qualifying distributions from Part XII, line 4.	8	106,797

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 <input type="checkbox"/> and enter "N/A" on line 1			
b		Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1	1,546
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.		3	1,546
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-		5	1,546
6		Credits/Payments			
a		2014 estimated tax payments and 2013 overpayment credited to 2014	6a	7,328	
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	7,328
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	5,782
11		Enter the amount of line 10 to be Credited to 2015 estimated tax <input checked="" type="checkbox"/> 5,782 Refunded <input type="checkbox"/>		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? <input checked="" type="checkbox"/>		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 <input checked="" type="checkbox"/> \$ (2) On foundation managers <input checked="" type="checkbox"/> \$				
e		Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input checked="" type="checkbox"/> \$				
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 <input checked="" type="checkbox"/>		3		No
4a		Did the foundation have unrelated business gross income of \$1,000 or more during the year?		4a		No
b		If "Yes," has it filed a tax return on Form 990-T for this year?		4b		
5		Was there a liquidation, termination, dissolution, or substantial contraction during the year?		5		No
		If "Yes," attach the statement required by General Instruction T. <input checked="" type="checkbox"/>				
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) <input checked="" type="checkbox"/> CT				
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				
14	The books are in care of GEORGE S BROWNELL Telephone no (920) 751-3912 Located at 3139 WESTFIELD RIDGE NEENAH WI ZIP+4 54956			
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		
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		
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))?

☐ 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 4945(d)(4)(A)? (see instructions).

☐ Yes ☒ No

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

☐ Yes ☒ No

b

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

5b

Organizations relying on a current notice regarding disaster assistance check here.

☒

c

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

☐ Yes ☐ No

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

6a

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

☐ Yes ☒ No

b

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

6b

No

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

7a

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

☐ Yes ☒ No

b

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

7b

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

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
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	2,239,590
b	Average of monthly cash balances.	1b	203,249
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	2,442,839
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	2,442,839
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	36,643
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	2,406,196
6	Minimum investment return. Enter 5% of line 5.	6	120,310

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	120,310
2a	Tax on investment income for 2014 from Part VI, line 5.	2a	1,546
b	Income tax for 2014 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	1,546
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	118,764
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	118,764
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	118,764

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	106,797
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	0
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	0
b	Cash distribution test (attach the required schedule).	3b	0
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	106,797
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	1,546
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	105,251

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				118,764
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only.			101,137	
b Total for prior years 2012 , 2011 , 2010				
3 Excess distributions carryover, if any, to 2014				
a From 2009.				
b From 2010.				
c From 2011.				
d From 2012.				
e From 2013.				0
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2014 from Part XII, line 4 ▶ \$ 106,797				
a Applied to 2013, but not more than line 2a			101,137	
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).				
d Applied to 2014 distributable amount.				5,660
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
6 Enter the net total of each column as indicated below:	0			
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				113,104
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	0			
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. . . .	0			

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)

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))

MEAD M BROWNELL K HYDE BROWNELL

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 email address of the person to whom applications should be addressed

b

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

c

Any submission deadlines

d

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

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

Form **990-PF** (2014)

Enter gross amounts unless otherwise indicated

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

[illegible]

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
MEAD M BROWNELL	PRESIDENT 0	0		
516 WAKE ROBIN DRIVE SHELBURNE,VT 05482				
K HYDE BROWNELL	VICE PRESIDENT 0	0		
516 WAKE ROBIN DRIVE SHELBURNE,VT 05482				
THOMAS H BROWNELL	V P /ASSISTANT TREASURER 0	0		
44 OVERLAKE PARK BURLINGTON,VT 05401				
GEORGE S BROWNELL	SECRETARY 0	0		
3139 WESTFIELD RIDGE NEENAH,WI 54956				
KENNETH C BROWNELL	VICE PRESIDENT 0	0		
PO BOX 414 LEVERETT,MA 01054				

Note. If you checked Box D above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and enter an adjustment in column (g) to correct the basis. See *Column (g)* in the separate instructions for how to figure the amount of the adjustment.

Note. You may aggregate all long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which NO adjustments or codes are required. Enter the total directly on Schedule D, line 8a; you are not required to report these transactions on Form 8949 (see instructions).

☒ (F) Long-term transactions not reported to you on Form 1099-B

Note. If you checked Box D above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and enter an adjustment in column (g) to correct the basis. See *Column (g)* in the separate instructions for how to figure the amount of the adjustment.

TY 2014 Accounting Fees Schedule

Name: Evergreen Foundation Inc

EIN: 06-1482180

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX PREPARATION FEE	4,497			4,497

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

TY 2014 Depreciation Schedule

Name: Evergreen Foundation Inc

EIN: 06-1482180

**TY 2014 Investments Corporate
Bonds Schedule**

Name: Evergreen Foundation Inc
EIN: 06-1482180

Name of Bond	End of Year Book Value	End of Year Fair Market Value
RAYMOND JAMES - SEE ATTACHED	68,993	72,091

**TY 2014 Investments Corporate
Stock Schedule**

Name: Evergreen Foundation Inc
EIN: 06-1482180

Name of Stock	End of Year Book Value	End of Year Fair Market Value
GLENMEDE - SEE ATTACHED	1,545,738	2,055,195

TY 2014 Investments - Other Schedule

Name: Evergreen Foundation Inc

EIN: 06-1482180

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
RJ MUTUAL FDS - SEE ATTACHED		16,201	45,624

TY 2014 Other Expenses Schedule

Name: Evergreen Foundation Inc

EIN: 06-1482180

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FILING FEE	15			

TY 2014 Other Professional Fees Schedule

Name: Evergreen Foundation Inc

EIN: 06-1482180

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT FEES	12,826	12,826		

TY 2014 Taxes Schedule

Name: Evergreen Foundation Inc

EIN: 06-1482180

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAX PAID	524	524		

ASSET LIST as of December 31, 2014

Quantity	Security Name	Unit Cost (\$)	Total Cost (\$)	Current Price (\$)	Market Value (\$)	Percent Assets (%)	Unrealized Gain/Loss (\$)	Est. Annual Income (\$)	Current Yield (%)
CASH									
101	Cash Reserve	1.00	101	1.00	101	0.0%	0	0	0.0%
154,932	Glenmede Fund Inc-Govt Cash Portfolio Dtd 1/1/1988	1.00	154,932	1.00	154,932	7.0%	0	0	0.0%
CASH			155,033		155,033	7.0%	0	0	0.0%
EQUITY									
COMMON STOCKS									
Consumer Discretionary									
300	Advance Auto Parts	67.94	20,382	159.28	47,784	2.2%	27,402	72	0.2%
600	Dollar Tree Inc	56.06	33,633	70.38	42,228	1.9%	8,595	0	0.0%
500	Omnicom Group	66.92	33,461	77.47	38,735	1.8%	5,274	1,000	2.6%
500	Viacom Inc-Class B	17.80	8,902	75.25	37,625	1.7%	28,723	660	1.8%
500	Yum Brands Inc	13.29	6,646	72.85	36,425	1.6%	29,779	820	2.3%
TOTAL for CONSUMER DISCRETIONARY			103,024		202,797	9.2%	99,773	2,552	1.3%
Consumer Staples									
300	Nestle SA ADR	58.00	17,399	73.42	22,025	1.0%	4,626	608	2.8%
600	Pepsico Inc.	63.87	38,321	94.56	56,736	2.6%	18,415	1,572	2.8%
700	Procter & Gamble Co	63.63	44,538	91.09	63,763	2.9%	19,225	1,801	2.8%
TOTAL for CONSUMER STAPLES			100,259		142,524	6.4%	42,265	3,981	2.8%
Energy									
240	California Res Corp	7.04	1,690	5.51	1,322	0.1%	-368	0	0.0%
400	Chevron Corp	0.43	173	112.18	44,872	2.0%	44,699	1,712	3.8%
400	National Oilwell Varco Inc	78.99	31,595	65.53	26,212	1.2%	-5,383	736	2.8%
600	Occidental Petroleum Corp.	77.97	46,783	80.61	48,366	2.2%	1,583	1,728	3.6%
600	Schlumberger Ltd.	62.81	37,689	85.41	51,246	2.3%	13,557	960	1.9%
TOTAL for ENERGY			117,930		172,018	7.8%	54,088	5,136	3.0%
Financials									
500	Ace Ltd	78.58	39,289	114.88	57,440	2.6%	18,151	1,300	2.3%
600	American Express Co.	56.97	34,181	93.04	55,824	2.5%	21,643	624	1.1%
100	BlackRock Inc	195.49	19,549	357.56	35,756	1.6%	16,207	772	2.2%

ASSET LIST as of December 31, 2014 - continued

Quantity	Security Name	Unit Cost (\$)	Total Cost (\$)	Current Price (\$)	Market Value (\$)	Percent Assets (%)	Unrealized Gain/Loss (\$)	Est. Annual Income (\$)	Current Yield (%)
EQUITY									
COMMON STOCKS									
Financials									
1,700	Golub Capital Bdc Inc	16.94	28,790	17.93	30,481	1.4%	1,691	2,176	7.1%
2,000	Hercules Technology Growth	13.98	27,957	14.88	29,760	1.3%	1,803	2,480	8.3%
600	JPMorgan Chase & Co	57.81	34,686	62.58	37,548	1.7%	2,862	960	2.6%
2,000	New Mountain Finance Corp	15.11	30,213	14.94	29,880	1.4%	-333	2,720	9.1%
700	PNC Financial Services Group	58.89	41,225	91.23	63,861	2.9%	22,636	1,344	2.1%
2,000	Tcp Cap Corp	15.68	31,361	16.78	33,560	1.5%	2,199	2,880	8.6%
TOTAL for FINANCIALS			287,250		374,110	16.9%	86,860	15,256	4.1%
Health Care									
1,000	Abbott Laboratories	9.42	9,418	45.02	45,020	2.0%	35,602	960	2.1%
700	Baxter Intl Inc.	65.83	46,080	73.29	51,303	2.3%	5,223	1,456	2.8%
800	Medtronic Inc.	45.03	36,021	72.20	57,760	2.6%	21,739	976	1.7%
900	Roche Holdings Ltd Sponsored ADR	37.70	33,930	33.95	30,558	1.4%	-3,372	824	2.7%
400	Waters Corp	59.99	23,997	112.72	45,088	2.0%	21,091	0	0.0%
TOTAL for HEALTH CARE			149,447		229,729	10.4%	80,282	4,216	1.8%
Industrials									
300	Boeing Co.	129.99	38,997	129.98	38,994	1.8%	-3	1,092	2.8%
860	Emerson Electric Co.	41.05	35,305	61.73	53,088	2.4%	17,782	1,617	3.0%
400	United Parcel Service - CL B	74.67	29,869	111.17	44,468	2.0%	14,600	1,072	2.4%
150	W W Grainger Inc	203.52	30,527	254.89	38,234	1.7%	7,706	648	1.7%
TOTAL for INDUSTRIALS			134,698		174,783	7.9%	40,085	4,429	2.5%
Information Technology									
489	Accenture Plc	75.83	37,083	89.31	43,673	2.0%	6,590	998	2.3%
500	Apple Inc.	69.35	34,673	110.38	55,190	2.5%	20,517	940	1.7%
2,000	Cisco Systems	19.58	39,165	27.82	55,630	2.5%	16,465	1,520	2.7%
488	Mastercard Inc-CL A	73.32	35,780	86.16	42,046	1.9%	6,266	312	0.7%
1,000	Microsoft Corp.	26.12	26,125	46.45	46,450	2.1%	20,326	1,240	2.7%

ASSET LIST as of December 31, 2014 - continued

Quantity	Security Name	Unit Cost (\$)	Total Cost (\$)	Current Price (\$)	Market Value (\$)	Percent Assets (%)	Unrealized Gain/Loss (\$)	Est. Annual Income (\$)	Current Yield (%)
EQUITY									
COMMON STOCKS									
Information Technology									
1,000	Oracle Corp	31.89	31,890	44.97	44,970	2.0%	13,080	480	1.1%
600	Qualcomm Corp	58.99	35,391	74.33	44,598	2.0%	9,207	1,008	2.3%
TOTAL for INFORMATION TECHNOLOGY			240,107		332,557	15.0%	92,449	6,498	2.0%
TOTAL for COMMON STOCKS			1,132,716		1,628,518	73.7%	495,802	42,067	2.6%
MUTUAL FUNDS / SMA									
Small Cap									
2,115	Glenmede Advisor Small Cap	26.11	55,219	25.92	54,813	2.5%	-405	40	0.1%
700	iShares S & P Smallcap 600	68.77	48,139	114.06	79,842	3.6%	31,703	980	1.2%
TOTAL for SMALL CAP			103,358		134,655	6.1%	31,297	1,020	0.8%
International									
10,420	DFA Ta World Ex US Core Equity Port	10.25	106,782	9.54	99,402	4.5%	-7,380	2,855	2.9%
4,635	Glenmede Intl Secured Options Port	11.02	51,076	10.14	46,995	2.1%	-4,080	876	1.9%
3,034	Oakmark International Fd I	25.48	77,317	23.34	70,816	3.2%	-6,501	0	0.0%
2,873	Tweedy Browne Global Value Fund	25.93	74,489	26.04	74,808	3.4%	319	948	1.3%
TOTAL for INTERNATIONAL			309,664		292,022	13.2%	-17,642	4,679	1.6%
TOTAL for MUTUAL FUNDS / SMA			413,022		426,677	19.3%	13,655	5,699	1.3%
EQUITY			1,545,738		2,055,195	93.0%	509,458	47,766	2.3%
ACCRUED DIVIDENDS					2,431				
EQUITY TOTAL					2,057,626				
TOTAL for 8035-11			1,700,771		2,210,229	100%	509,458	47,766	2.2%
TOTAL ACCRUED INCOME					2,431				
GRAND TOTAL for 8035-11					2,212,660				

Your Portfolio

For more information,
visit raymondjames.com/investoraccess

	Quantity	Price	Value	Cost
Cash & Cash Alternatives				
Raymond James Bank Deposit Program ‡ 0.01% - Selected Sweep Option			\$106,307.86	
Citibank NA			\$62,408.89	
Raymond James Bank N.A.			\$43,898.97	
Your bank priority state: WI				
Participating banks recently added: Wilshire Bank 12/18/2014; Cadence Bank 12/11/2014; Grandpoint Bank 12/03/2014; Franklin Synergy Bank 11/17/2014; Florida Community Bank 09/03/2014				
‡ Please See the Raymond James Bank Deposit Program on the Understanding Your Statement page.				
Cash & Cash Alternatives Total			\$106,307.86	106,307.86
Exchange-Traded Products (ETPs)				
ISHARES TR CORE S&P SCP ETF (IJR)	400.000	\$114.060	\$45,624.00	16,201
Exchange-Traded Products Total			\$45,624.00	16,201
Fixed Income				
PSEG POWER LLC NTS ISIN US69362BAN29 5.5000% DUE 12/01/2015 (69362BAN2)	\$40,000.00	\$104.134	\$41,653.60	40,101.89
Debt Classification: Senior Unsecured				
Ratings Information: Moody's Long Term Rating: Baa1 S&P Long Term Rating BBB+, Long Term Watch Not Meaningful				
WELLS FARGO & COMPANY MTN ISIN US94974BFN55 4.1250% DUE 08/15/2023 (94974BFN5)	\$29,000.00	\$104.958	\$30,437.82	28,891
Debt Classification: Subordinated				
Ratings Information: Moody's Long Term Rating A3 S&P Long Term Rating A				
Fixed Income Total			\$72,091.42	68,992.89
Portfolio Total			\$224,023.28	191,501.75

^A Adjusted cost basis was used to calculate the gain or (loss) figure

° Please see Cost Basis on the Understanding Your Statement page.



Evergreen Foundation, Inc.
EIN 061482180
12/31/14

Part XV, Grants and Contributions Paid During the Year

Recipient Name & Address	Relationship	Foundation Status of Recipient	Purpose of Grant or Contribution	Amount
Union Theological Seminary 3041 Broadway New York, NY 10027	No Relationship	Public Charity	General Purposes	\$500.00
Neenah Public Library 240 E. Wisconsin Ave Neenah, WI 54957-0569	No Relationship	Public Charity	General Purposes	\$250.00
Junior Achievement of Wisconsin, Inc. 300 North Appleton Street Appleton, WI 54911	No Relationship	Public Charity	General Purposes	\$250.00
University of Michigan 3003 S. State Street Suite 8000 Ann Arbor, MI 48109-1288	No Relationship	Public Charity	General Purposes	\$2,500.00
Christine Ann Domestic Abuse Services PO Box 99 Neenah, WI 54957-0099	No Relationship	Public Charity	General Purposes	\$1,500.00
St. Luke's Health Care Foundation Child Protection Center of Cedar Rapids, Iowa 855 A. Avenue NE, Suite 105 Cedar Rapids, IA 52402	No Relationship	Public Charity	General Purposes	\$250.00

Evergreen Foundation, Inc.

EIN 061482180

12/31/14

Holderness School Plymouth, NH 03264-1879	No Relationship	Public Charity	General Purposes	\$250.00
Wisconsin Public Radio 821 University Avenue Madison, WI 53706	No Relationship	Public Charity	General Purposes	\$150.00
The Nature Conservancy – Adirondack Land Trust 8 Nature Way P.O Box 65 Keene Valley, NY 12943	No Relationship	Public Charity	General Purposes	\$25,000.00
Charlotte Congregation Church 403 Church Hill Rd Charlotte, VT 05445	No Relationship	Public Charity	General Purposes	\$5,000.00
The Nature Conservancy - Wisconsin 633 West Main Street Madison, WI 53703	No Relationship	Public Charity	General Purposes	\$1,250.00
Paine Memorial Free Library 2 Gilliland Lane Willsboro, NY 12996	No Relationship	Public Charity	General Purposes	\$1,000.00
The Central High School Foundation P.O. Box 31610 Omaha, NE 68131-0610	No Relationship	Public Charity	General Purposes	\$500.00

Evergreen Foundation, Inc.

EIN 061482180

12/31/14

Babson College The Fund for Babson Alumni Hall Babson Park, MA 02457	No Relationship	Public Charity	General Purposes	\$250.00
Vermont Land Trust 8 Bailey Avenue Montpelier, VT 0502	No Relationship	Public Charity	General Purposes	\$2,000.00
The Fisher Home, Hospice 1165 N Pleasant St Amherst, MA 01002	No Relationship	Public Charity	General Purposes	\$2,000.00
Vermont Symphony Orchestra 2 Church Street, Suite 3BBurlington, Vermont 05401	No Relationship	Public Charity	General Purposes	\$500.00
Amherst Cinema Arts Center Inc. 28 Amity Street Amherst, MA	No Relationship	Public Charity	General Purposes	\$500.00
Vermont Public Radio 365 Troy Avenue Colchester, VT 05446	No Relationship	Public Charity	General Purposes	\$150.00
Friends of Leverett Library 75 Montague Rd. P.O. Box 250 Leverett, MA 01054	No Relationship	Public Charity	General Purposes	\$1,500.00

Evergreen Foundation, Inc.

EIN 061482180

12/31/14

Adirondack Council 103 Hand Ave # 3 Elizabethtown, NY 12932	No Relationship	Public Charity	General Purposes	\$1,000.00
Amherst Survival Center PO Box 9629 North Amherst MA 01059-9629	No Relationship	Public Charity	General Purposes	\$2,500.00
YMCA of the Fox Cities Strong Kids Campaign 110 W.N. Water Street Neenah, WI 54956	No Relationship	Public Charity	General Purposes	\$750.00
Fox Valley Symphony Orchestra Association, Inc. 111 W. College Avenue, Suite 500 Appleton, WI 549115781	No Relationship	Public Charity	General Purposes	\$1,000.00
Lake Champlain Committee 106 Main Street, Suite 200 Burlington, VT 05401	No Relationship	Public Charity	General Purposes	\$2,000.00
Colorado College 902 N Cascade Ave Colorado Springs, CO 80903	No Relationship	Public Charity	General Purposes	\$500.00
Bowdoin College 902 N Cascade Ave Colorado Springs, CO 80903	No Relationship	Public Charity	General Purposes	\$1,000.00

Evergreen Foundation, Inc.

EIN 061482180

12/31/14

The Nature Conservancy - Adirondack 4245 North Fairfax Drive, Suite 100 Arlington, VA 22203-1606	No Relationship	Public Charity	General Purposes	\$25,000.00
Shelburne Farms 1611 Harbor Rd. Shelburne, VT 05482	No Relationship	Public Charity	General Purposes	\$250.00
Shelburne Museum Shelburne Museum Annual Fund P.O. Box 10 Shelburne, VT 05482	No Relationship	Public Charity	General Purposes	\$250.00
Isle La Motte Preservation Trust 3849 West Shore Road Isle La Motte, VT 10001	No Relationship	Public Charity	General Purposes	\$750.00
Catamount Trail Association 1 Mill St #350, Burlington, VT 05401	No Relationship	Public Charity	General Purposes	\$500.00
Hunger Free Vermont 38 Eastwood Drive #100 South Burlington, VT 05403	No Relationship	Public Charity	General Purposes	\$500.00
Healing Winds 4650 Jackson Street Burlington, VT	No Relationship	Public Charity	General Purposes	\$1,000.00

Evergreen Foundation, Inc.

EIN 061482180

12/31/14

Local Motion 1 Steele St Burlington, VT 05401	No Relationship	Public Charity	General Purposes	\$1,000.00
Wounded Warrior Project P.O. Box 758517 Topeka, Kansas 66675	No Relationship	Public Charity	General Purposes	\$1,000.00
Lake Champlain Land Trust One Main Street, Suite 205 Burlington, VT 05401	No Relationship	Public Charity	General Purposes	\$1,000.00
Visiting Nurse Association of Chittenden and Grand Isle Counties Attn: Ann Irwin 1110 Prim Road Colchester, VT 05446	No Relationship	Public Charity	General Purposes	\$1,000.00
Spectrum Health & Services, Inc. Progress Haddington Plaza 5619-25 Vine Street, Philadelphia, PA 19133	No Relationship	Public Charity	General Purposes	\$5,000.00
Kestrel Land Trust PO Box 1016, Amherst MA 01004	No Relationship	Public Charity	General Purposes	\$1,500.00
Ausable River Assoc P.O. Box 8, Wilmington, NY 12997	No Relationship	Public Charity	General Purposes	\$1,500.00

Evergreen Foundation, Inc.

EIN 061482180

12/31/14

Safe Passage 43 Center St., Ste 304 Northampton, MA 01060	No Relationship	Public Charity	General Purposes	\$1,500.00
The Intervale Center 180 Intervale Rd Burlington, VT 05401	No Relationship	Public Charity	General Purposes	\$2,000.00
Cochran's Ski Area 910 Cochran Road Richmond, VT 05477	No Relationship	Public Charity	General Purposes	\$500.00
Community Health Centers of Burlington 617 Riverside Avenue Burlington, Vermont 05401	No Relationship	Public Charity	General Purposes	\$1,000.00
Craig's Doors 256 North Pleasant Street Amherst, MA 01002	No Relationship	Public Charity	General Purposes	\$1,500.00
Red Barn Music School 409 Main Street #19 Amherst, MA 01002	No Relationship	Public Charity	General Purposes	\$500.00
Connecticut River Watershed Council 15 Bank Row Street Greenfield, MA 01301	No Relationship	Public Charity	General Purposes	<u>\$1,000.00</u>
				<u>\$102,300.00</u>

2014 Tax Information Statement

Account Number: 8035-11-4/1
 Recipient's Tax ID Number: 06-1482180
 Recipient's Name and Address:
 EVERGREEN FOUNDATION INC
 C/O GEORGE S BROWNELL
 3139 WESTFIELD RIDGE
 NEENAH, WI 54956

THE GLENMEDE TRUST COMPANY, N.A.
 1650 MARKET STREET, SUITE 1200
 PHILADELPHIA, PA 19103-7391

☐ Corrected ☐ 2nd TIN notice

2014 Proceeds from Broker and Barter Exchange Transactions

Sales are listed at Gross Proceeds less commissions and option premiums.
 Cost or Other Basis amounts shown with a "U" are unknown or unsubstantiated.

Description of property		Cusip Number	Date Sold or Disposed	Date Acquired	Proceeds	Cost or Other Basis	Code if any	Adjustments	Net Gain or Loss	Federal Income Tax Withheld	State Tax Withheld
Short Term Sales											
200.0 TARGET CORP											
87612E106			01/24/2014	11/27/2013	11,681.80	12,921.00		0.00	-1,239.20	0.00	0.00
500.0			WISDOMTREE EMG MKTS EQ INCOME FD								
97717W315			01/30/2014	05/22/2013	23,240.09	28,380.00		0.00	-5,139.91	0.00	0.00
0.089			KINDER MORGAN MANAGEMENT LLC								
49455U100			02/14/2014	11/14/2013	6.63	0.01		0.00	6.62	0.00	0.00
800.0			CH ROBINSON WORLDWIDE INC								
12541W209			03/27/2014	Various	40,726.77	47,234.46		0.00	-6,507.69	0.00	0.00
5.0			KINDER MORGAN MANAGEMENT LLC								
49455U100			03/27/2014	11/14/2013	354.04	0.01		0.00	354.03	0.00	0.00
700.0			COACH INC								
189754104			05/28/2014	01/24/2014	28,538.36	34,221.11		0.00	-5,682.75	0.00	0.00
200.0			ENSCO PLC SHS CLASS A								
G3157S106			09/24/2014	11/07/2013	8,473.03	12,052.00		0.00	-3,578.97	0.00	0.00
Total Short Term Sales					113,020.72	134,808.59		0.00	-21,787.87	0.00	0.00
Long Term Sales											

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2014 Tax Information Statement

Account Number: 8035-11-4/1
 Recipient's Tax ID Number: 06-1482180
 Recipient's Name and Address:
 EVERGREEN FOUNDATION INC
 C/O GEORGE S BROWNELL
 3139 WESTFIELD RIDGE
 NEENAH, WI 54956

THE GLENMEDE TRUST COMPANY, N.A.
 1650 MARKET STREET, SUITE 1200
 PHILADELPHIA, PA 19103-7391

☐ Corrected ☐ 2nd TIN notice

Sales are listed at Gross Proceeds less commissions and option premiums.
 Cost or Other Basis amounts shown with a "U" are unknown or unsubstantiated.

Description of property		Cusip Number	Date Sold or Disposed	Date Acquired	Proceeds	Cost or Other Basis	Code if any	Adjustments	Net Gain or Loss	Federal Income Tax Withheld	State Tax Withheld
350.0 TARGET CORP											
87612E106			01/24/2014	03/21/2006	20,443.14	18,718.68		0.00	1,724.46	0.00	0.00
250.0 TARGET CORP											
87612E106			01/24/2014	11/29/2012	14,602.24	15,690.50		0.00	-1,088.26	0.00	0.00
200.0 VANGUARD FTSE EMERGING MARKETS ETF											
922042858			01/30/2014	11/29/2012	7,549.86	8,436.00		0.00	-886.14	0.00	0.00
1000.0 COGNIZANT TECH SOLUTIONS CRP											
192446102			03/27/2014	Various	47,679.44	34,321.00		0.00	13,358.44	0.00	0.00
220.0 PRAXAIR INC.											
74005P104			03/27/2014	Various	28,358.78	10,543.24		0.00	17,815.54	0.00	0.00
930.0 VANGUARD FTSE EMERGING MARKETS ETF											
922042858			03/27/2014	03/25/2010	37,115.47	38,367.73		0.00	-1,252.26	0.00	0.00
70.0 VANGUARD FTSE EMERGING MARKETS ETF											
922042858			03/27/2014	11/29/2012	2,793.64	2,952.60		0.00	-158.96	0.00	0.00
100.0 SCHLUMBERGER LTD.											
806857108			05/07/2014	10/01/2012	10,176.77	7,339.00		0.00	2,837.77	0.00	0.00
145.0 3M CO											
88579Y101			05/07/2014	Various	20,368.90	11,930.73		0.00	8,438.17	0.00	0.00

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3M CO	255.0									
88579Y101		05/07/2014	11/29/2012	35,821.17	23,118.30		0.00	12,702.87	0.00	0.00
200.0 VIACOM INC-CLASS B										
92553P201		05/07/2014	05/17/2006	16,633.87	7,684.34		0.00	8,949.53	0.00	0.00
200.0 ASTRAZENECA GROUP PLC - SPONS ADR										
046353108		05/28/2014	03/27/2013	14,253.68	9,842.78		0.00	4,410.90	0.00	0.00
200.0 MEDTRONIC INC.										
585055106		05/28/2014	Various	12,041.73	10,258.23		0.00	1,783.50	0.00	0.00
100.0 QUALCOMM CORP.										
747525103		05/28/2014	11/29/2012	8,039.82	6,341.00		0.00	1,698.82	0.00	0.00
100.0 VIACOM INC-CLASS B										
92553P201		05/28/2014	Various	8,586.81	3,814.63		0.00	4,772.18	0.00	0.00
98.0 WALGREEN CO.										
931422109		05/28/2014	11/29/2012	6,855.92	3,304.56		0.00	3,551.36	0.00	0.00
100.0 WATERS CORP										
941848103		05/28/2014	11/29/2012	10,021.77	8,454.89		0.00	1,566.88	0.00	0.00
700.0 WALGREEN CO.										
931422109		08/05/2014	11/29/2012	48,869.34	23,604.00		0.00	25,265.34	0.00	0.00

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Sales are listed at Gross Proceeds less commissions and option premiums.
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Description of property	Cusip Number	Date Sold or Disposed	Date Acquired	Proceeds	Cost or Other Basis	Code if any	Adjustments	Net Gain or Loss	Federal Income Tax Withheld	State Tax Withheld
100.0 APPLE COMPUTER INC.										
037833100		09/24/2014	12/20/2012	10,146.77	7,459.71		0.00	2,687.06	0.00	0.00
600.0 ASTRAZENECA GROUP PLC - SPONS ADR										
046353108		09/24/2014	03/27/2013	43,039.02	29,528.34		0.00	13,510.68	0.00	0.00
150.0 YUM BRANDS INC										
988498101		09/24/2014	05/23/2003	10,877.75	1,993.87		0.00	8,883.88	0.00	0.00
600.0 ENSCO PLC SHS CLASS A										
G3157S106		09/24/2014	05/15/2013	25,419.10	36,924.96		0.00	-11,505.86	0.00	0.00
100.0 APPLE COMPUTER INC.										
037833100		12/10/2014	12/20/2012	11,249.75	7,459.72		0.00	3,790.03	0.00	0.00
200.0 INTERNATIONAL BUSINESS MACHINES CORP.										
459200101		12/10/2014	12/03/2012	32,054.29	37,849.00		0.00	-5,794.71	0.00	0.00
Total Long Term Sales				482,999.03	365,937.81		0.00	117,061.22	0.00	0.00

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Raymond James & Associates, Inc.

Account 52847283

2014

Proceeds Not Reported to the IRS

LONG-TERM TRANSACTIONS

NOT reported on Form 1099-B

Report on Form 8949, Part II, with Box F checked

Description of property

Date sold or disposed	Quantity	Shown (G)ross (N)et	Proceeds	Date acquired	Cost or other basis	Adjustments & Code(s), if any	Gain or loss(-) & 7- Loss not allowed(X)	Additional information
DOMINION RESOURCES, INC / CUSIP 25746UBB4 / Symbol. 12/09/14	40,000 000	43,749 38		05/29/09	40,266 50	..	3,482 88	Redemption
DUKE POWER COMPANY, LLC / CUSIP 264399EQ5 / Symbol. 02/01/14	40,000 000	40,000 00		05/29/09	40,000.00	.	0 00	Redemption
THE GOLDMAN SACHS GROUP, INC / CUSIP 38143UAW1 / Symbol 10/01/14	25,000 000	25,000 00		09/22/04	25,000 00	...	0.00	Redemption
	Totals:	108,749.38			105,266.50	...	3,482.88	



52847283 - 003