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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 WHITNEY AND ANNE STONE FOUNDATION		A Employer identification number 13-3394681	
% CHILTON TRUST COMPANY LLC		B Telephone number (see instructions) (203) 352-4000	
Number and street (or P O box number if mail is not delivered to street address) C/O CHILTON TRUST COMPANY 1290 E MAIN STREET Suite		C If exemption application is pending, check here <input type="checkbox"/>	
Room/suite			
City or town, state or province, country, and ZIP or foreign postal code STAMFORD, CT 06902			
G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input checked="" type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <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		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16)▶\$ 4,641,877		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
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 checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities.	109,819	109,819		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	1,334,223			
	b Gross sales price for all assets on line 6a 4,085,478				
	7 Capital gain net income (from Part IV, line 2) . . .		1,334,223		
	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)	2,350	41		
	12 Total. Add lines 1 through 11	1,446,392	1,444,083		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	15,832	7,916	0	7,916
	c Other professional fees (attach schedule)	33,812	16,906		16,906
	17 Interest				
	18 Taxes (attach schedule) (see instructions) . . .	11,552			
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	356			356
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	61,552	24,822	0	25,178
	25 Contributions, gifts, grants paid	209,644			209,644
	26 Total expenses and disbursements. Add lines 24 and 25	271,196	24,822	0	234,822
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	1,175,196			
	b Net investment income (if negative, enter -0-)		1,419,261		
	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			
	2	Savings and temporary cash investments	10,293	2,705,896	2,705,896
	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)	2,492,980 <input type="checkbox"/>	954,456	1,175,461
	c	Investments—corporate bonds (attach schedule).	163,812 <input type="checkbox"/>	98,850	97,765
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	373,083 <input type="checkbox"/>	373,083	662,755
	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)	3,040,168	4,132,285	4,641,877	
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	1,483,061	1,483,061	
28		Paid-in or capital surplus, or land, bldg , and equipment fund			
29		Retained earnings, accumulated income, endowment, or other funds	1,557,107	2,649,224	
30		Total net assets or fund balances (see instructions)	3,040,168	4,132,285	
31		Total liabilities and net assets/fund balances (see instructions) . . .	3,040,168	4,132,285	

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 3,040,168
2	Enter amount from Part I, line 27a	2 1,175,196
3	Other increases not included in line 2 (itemize) ▶ _____	3
4	Add lines 1, 2, and 3	4 4,215,364
5	Decreases not included in line 2 (itemize) ▶ <input type="checkbox"/> _____	5 83,079
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6 4,132,285

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	See Additional Data Table			
b				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	See Additional Data Table		
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	See Additional Data Table		
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	1,334,223
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	209,147	4,057,337	0 051548
2012	191,222	3,486,700	0 054843
2011	216,939	3,458,127	0 062733
2010	248,256	3,171,279	0 078283
2009	185,766	2,818,795	0 065903

2	Total of line 1, column (d).	2	0 31331
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 062662
4	Enter the net value of noncharitable-use assets for 2014 from Part X, line 5.	4	4,018,723
5	Multiply line 4 by line 3.	5	251,821
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	14,193
7	Add lines 5 and 6.	7	266,014
8	Enter qualifying distributions from Part XII, line 4.	8	234,822

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 VIExcise 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		1	28,385
Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)					
b		Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b		2	
c		All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)			
2		Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			
3		Add lines 1 and 2.		3	28,385
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	28,385
6		Credits/Payments		7	58,874
a	2014 estimated tax payments and 2013 overpayment credited to 2014	6a	8,874		
b	Exempt foreign organizations—tax withheld at source	6b			
c	Tax paid with application for extension of time to file (Form 8868)	6c	50,000		
d	Backup withholding erroneously withheld	6d		8	76
7		Total credits and payments. Add lines 6a through 6d.			
8		Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached		9	
9		Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		10	30,413
10		Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		11	
11		Enter the amount of line 10 to be Credited to 2015 estimated tax 30,413 Refunded			

Part VII-AStatements 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?		Yes	No
		1a		No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)? <i>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.</i>			No
		1b		No
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? <i>If "Yes," attach a detailed description of the activities.</i>	2		No
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? <i>If "Yes," attach a conformed copy of the changes</i>	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? <i>If "Yes," attach the statement required by General Instruction T.</i>	5		No
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? <i>If "Yes," complete Part II, col. (c), and Part XV.</i>	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) _____			
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? <i>If "No," attach explanation.</i>	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)? <i>If "Yes," complete Part XIV</i>	9		No
10	Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>	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 CHILTON TRUST COMPANY LLC Telephone no (203) 352-4000 Located at 1290 E MAIN STREET-3RD FLOOR STAMFORD CT ZIP +4 06902			
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? 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	16	Yes	No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here.	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			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions).	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here 20 , 20 , 20 , 20			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(4) Provide a grant to an organization other than a charitable, etc , organization described in section 4945(d)(4)(A)? (see instructions).	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.	<input checked="" type="checkbox"/>		
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?	<input type="checkbox"/> Yes <input type="checkbox"/> 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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	7b		

Part VIII

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

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).				
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
DAVID J WOOD JR	TRUSTEE	0	0	0
C/O CHILTON 1290 E MAIN ST STAMFORD, CT 06902	2 0			
ELIZABETH WOOD	TRUSTEE	0	0	0
C/O CHILTON TRUST COMPANY STAMFORD, CT 06902	2 0			
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.				

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	3,211,680
b	Average of monthly cash balances.	1b	205,487
c	Fair market value of all other assets (see instructions).	1c	662,755
d	Total (add lines 1a, b, and c).	1d	4,079,922
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	4,079,922
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	61,199
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	4,018,723
6	Minimum investment return. Enter 5% of line 5.	6	200,936

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	200,936
2a	Tax on investment income for 2014 from Part VI, line 5.	2a	28,385
b	Income tax for 2014 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	28,385
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	172,551
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	172,551
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	172,551

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	234,822
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	234,822
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	234,822

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				172,551
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only.				
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.				14,639
d From 2012.				22,411
e From 2013.				14,559
f Total of lines 3a through e.	51,609			
4 Qualifying distributions for 2014 from Part XII, line 4 ▶ \$ 234,822				
a Applied to 2013, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).				
d Applied to 2014 distributable amount.				172,551
e Remaining amount distributed out of corpus	62,271			
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	113,880			
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				0
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	113,880			
10 Analysis of line 9				
a Excess from 2010. . . .				
b Excess from 2011. . . .				14,639
c Excess from 2012. . . .				22,411
d Excess from 2013. . . .				14,559
e Excess from 2014. . . .				62,271

Part XIV

4942(j)(3) or 4942(j)(5)

3

Part XV

1

2

Field	Value
id	1
name	John Doe
email	john.doe@example.com
password	12345678
role	user
status	active
created_at	2023-10-27 10:30:00
updated_at	2023-10-27 10:30:00

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	209,644
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)

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?

Yes	No
-----	----

No

a Transfers from the reporting foundation to a noncharitable exempt organization of

(1) Cash.

1a(1)

No

(2) Other assets.

1a(2)

No

b Other transactions

(1) Sales of assets to a noncharitable exempt organization.

1b(1)

No

(2) Purchases of assets from a noncharitable exempt organization.

1b(2)

No

(3) Rental of facilities, equipment, or other assets.

1b(3)

No

(4) Reimbursement arrangements.

1b(4)

No

(5) Loans or loan guarantees. . . .

1b(5)

No

(6) Performance of services or membership or fundraising solicitations.

1b(6)

No

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

1c

No

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

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? . . . ☐ Yes ☒ No

b If "Yes," complete the following schedule

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.

<p>*****</p> <p>_____ Signature of officer or trustee</p>	<p>2015-08-10</p> <p>_____ Date</p>	<p>*****</p> <p>_____ Title</p>
---	---	-------------------------------------

May the IRS discuss this return with the preparer shown below (see instr)? ☒ Yes ☐ No

**Sign
Here**

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.

* * * * *

2015-08-10

* * * * *

Signature of officer or trustee

Date

Title

May the IRS discuss this return with the preparer shown below (see instr)? ☒ Yes ☐ No

☒ Yes ☐ No

**Paid
Preparer
Use
Only**

Form **990-PF** (2014)

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
SILVERCREST SELECT GROWTH EQUITY FUND	P		
SILVERCREST SELECT GROWTH EQUITY FUND	P		
PUBLICLY TRADED SECURITIES	P	2014-04-01	2014-09-17
PUBLICLY TRADED SECURITIES	P		
PUBLICLY TRADED SECURITIES	P		
PUBLICLY TRADED SECURITIES	P		
PUBLICLY TRADED SECURITIES	P		
CAPITAL GAIN DIVIDENDS	P		


Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
		328	-328
76,153			76,153
19,626		19,530	96
569,562		382,186	187,376
443,880		435,672	8,208
1,660,237		1,169,181	491,056
1,315,871		744,361	571,513
			149


Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) 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	
			-328
			76,153
			96
			187,376
			8,208
			491,056
			571,510


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>				
MARTHA JEFFERSON HOSPITAL FOUNDATION 500 MARTHA JEFFERSON DRIVE CHARLOTTESVILLE,VA 22911	NONE	PC	COMMUNITY HEALTHCARE AND HOSPITAL FUNDRAISING	9,644
ST PAULS EPISCOPAL CHURCH PO BOX 37 IVY,VA 22945	NONE	PC	SUPPORT OF RELIGIOUS INSTITUTION	20,000
CHARLOTTESVILLE FREE CLINIC 1138 ROSE HILL DRIVE SUITE 200 CHARLOTTESVILLE,VA 22903	NONE	PC	HEALTHCARE	5,000
ALBEMARLE COUNTY HISTORICAL SOCIETY 200 2ND STREET NE CHARLOTTESVILLE,VA 22902	NONE	PC	HISTORIC PRESERVATION	2,500
ALZHEIMERS ASSOCIATION 1160 PEPSI PLACE SUITE 306 CHARLOTTESVILLE,VA 22901	NONE	PC	MEDICAL RESEARCH	3,000
AMERICAN RED CROSS 1105 ROSE HILL DRIVE CHARLOTTESVILLE,VA 22903	NONE	PC	HUMANITARIAN EFFORTS	5,000
BLUE RIDGE AREA FOOD BANK PO BOX 937 96 LAUREL HILL ROAD VERONA,VA 24482	NONE	PC	FREE FOOD DISTRIBUTION PROGRAMS	5,000
CAMP HOLIDAY TRAILS 400 HOLIDAY TRAILS LANE CHARLOTTESVILLE,VA 22903	NONE	PC	YOUTH PROGRAMS FOR SPECIAL NEEDS CHILDREN	4,000
CHARLOTTESVILLE-ALBEMARLE RESCUE SQUAD INC 828 MCINTIRE ROAD CHARLOTTESVILLE,VA 22902	NONE	PC	VOLUNTEER RESCUE PROGRAMS	4,500
BOYS AND GIRLS CLUBS OF CENTRAL VIRGINIA PO BOX 707 CHARLOTTESVILLE,VA 22902	NONE	PC	YOUTH PROGRAMS	5,000
CHARLOTTESVILLE AREA COMMUNITY FOUNDATION 114 4TH STREET SE CHARLOTTESVILLE,VA 22902	NONE	PC	COMMUNITY OUTREACH PROGRAM	7,000
CHESAPEAKE BAY FOUNDATION 6 HERNDON AVENUE ANNAPOLIS,MD 21403	NONE	PC	ENVIRONMENTAL PROTECTION & PRESERVATION	2,000
EPISCOPAL HIGH SCHOOL 1200 NORTH QUAKER LANE ALEXANDRIA,VA 22302	NONE	PC	EDUCATIONAL AND ACADEMIC PROGRAMS	10,000
FOOTHILLS CHILD ADVOCACY CENTER 1106 EAST HIGH STREET SUITE 100 CHARLOTTESVILLE,VA 22902	NONE	PC	CHILD CENTERED DEVELOPMENT PROGRAMS	4,000
THE GRIER SCHOOL PO BOX 308 TYRONE,PA 16686	NONE	PC	EDUCATIONAL AND ACADEMIC PROGRAMS	1,000
Total  3a				209,644


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				
HABITAT FOR HUMANITY 919 WEST MAIN STREET CHARLOTTESVILLE,VA 22903	NONE	PC	COMMUNITY DEVELOPMENT	2,000
HOSPICE OF THE PIEDMONT 675 PETER JEFFERSON PARKWAY SUITE 300 CHARLOTTESVILLE,VA 22911	NONE	PC	FREE HEALTHCARE SERVICES	9,000
MEALS ON WHEELS 704 ROSE HILL DRIVE CHARLOTTESVILLE,VA 22903	NONE	PC	FOOD DISTRIBUTION PROGRAMS	3,000
MILLER CENTER FOUNDATION PO BOX 400406 CHARLOTESVILLE,VA 22904	NONE	PC	RESEARCH AND EDUCATION RELATED TO AMERICAN HISTORY AND CONTEMPORARY POLICY	2,000
MILLER SCHOOL OF ALBEMARLE COUNTY 1000 SAMUEL MILLER LOOP CHARLOTTESVILLE,VA 22903	NONE	PC	EDUCATIONAL AND ACADEMIC PROGRAMS	5,000
PIEDMONT CASA INC 818 EAST HIGH STREET CHARLOTTESVILLE,VA 22902	NONE	PC	COURT-APPOINTED SPECIAL ADVOCACY FOR CHILDREN	4,500
PIEDMONT ENVIRONMENTAL COUNCIL 410 EAST WATER STREET SUITE 700 CHARLOTTESVILLE,VA 22902	NONE	PC	ENVIRONMENTAL PRESERVATION	1,000
SHELTER FOR HELP IN EMERGENCY PO BOX 1013 CHARLOTTESVILLE,VA 22902	NONE	PC	SERVICES AND AWARENESS FOR VICTIMS OF DOMESTIC VIOLENCE	3,000
SALVATION ARMY 207 RIDGE STREET CHARLOTTESVILLE,VA 22902	NONE	PC	COMMUNITY OUTREACH PROGRAM	6,000
SENIOR CENTER 1180 PEPSI PLACE CHARLOTTESVILLE,VA 22901	NONE	PC	COMMUNITY SENIOR CITIZEN PROGRAMS	1,000
SOUTHERN ENVIRONMENTAL LAW CENTER 201 WEST MAIN STREET SUITE 14 CHARLOTTESVILLE,VA 22902	NONE	PC	ENVIRONMENTAL PROTECTION	2,000
THOMAS JEFFERSON FOUNDATION INC PO BOX 217 CHARLOTTESVILLE,VA 22902	NONE	PC	LANDMARK PRESERVATION	10,000
UVA HEALTH FOUNDATION PO BOX 400807 CHARLOTTESVILLE,VA 22904	NONE	PC	MEDICAL AND SCIENTIFIC RESEARCH (SLINGLUFF-MELANOMA RESEARCH)	3,000
UVA LAW SCHOOL FOUNDATION 580 MASSIE ROAD CHARLOTTESVILLE,VA 22903	NONE	PC	EDUCATIONAL PURPOSES	1,000
WESTERN ALBEMARLE RESCUE SQUAD PO BOX 188 CROZET,VA 22932	NONE	PC	VOLUNTEER RESCUE PROGRAMS	5,000
Total  3a				209,644

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				
WORKSOURCE ENTERPRISES 1311 CARLTON AVENUE CHARLOTTESVILLE,VA 22902	NONE	PC	CAREER DEVELOPMENT FOR THE DISABLED	3,000
COMMONWEALTH OF VA VETERANS SERVICE FOUNDATION 900 EAST MAIN STREET 6TH FLOOR RICHMOND,VA 23219	NONE	PC	SUPPORT OF VETERANS	5,000
COMMUNITY INVESTMENT COLLABORATIVE PO BOX 2976 CHARLOTTESVILLE,VA 22902	NONE	PC	COMMUNITY OUTREACH PROGRAM	1,000
SORENSEN INSTITUTE FOR POLITICAL LEADERSHIP PO BOX 400206 CHARLOTTESVILLE,VA 22904	NONE	PC	POLITICAL LEADERSHIP PROGRAMS	1,000
SHRINE MONT - SHOUT IT FROM THE MOUNTAIN 217 SHRINE MONT CIRCLE ORKNEY SPRINGS,VA 22845	NONE		SUPPORT OF RELIGIOUS INSTITUTIONS	1,000
UVA ALUMNI ASSOCIATION PO BOX 400314 CHARLOTTESVILLE,VA 22904	NONE	PC	EDUCATIONAL AND ACADEMIC PROGRAMS	1,500
UVA FUND - DELTA KAPPA EPSILON CAPITAL FUND PO BOX 400314 CHARLOTTESVILLE,VA 22904	NONE	PC	EDUCATIONAL AND ACADEMIC PROGRAMS	1,000
UVA CHILDRENS MEDICAL CENTER PO BOX 400314 CHARLOTTESVILLE,VA 22904	NONE	PC	MEDICAL RESEARCH	6,000
UNITED WAY - THOMAS JEFFERSON AREA 806 E HIGH STREET CHARLOTTESVILLE,VA 22902	NONE	PC	COMMUNITY OUTREACH PROGRAMS	15,000
PLANNED PARENTHOOD ADVOCATES OF VIRGINIA INC PO BOX 7271 RICHMOND,VA 23221	NONE	PC	REPRODUCTIVE HEALTH CARE AND FAMILY PLANNING	2,000
CHARLOTTESVILLE ALBEMARLE SPCA PO BOX 7047 CHARLOTTESVILLE,VA 22906	NONE	PC	ANIMAL PROTECTION	3,000
CHARLOTTESVILLE AREA RIDING THERAPY 5924 FRIED FARM ROAD CROZET,VA 22932	NONE	PC	THERAPETIC PROGRAMS FOR THE DISABLED	2,000
CENTRAL VIRGINIA LEGAL AID SOCIETY 101 WEST BROAD STREET SUITE 101 RICHMOND,VA 23241	NONE	PC	FREE LEGAL AID SERVICES	1,000
CHATHAM HALL 800 CHATHAM HALL CIRCLE CHATHAM,VA 24531	NONE	PC	EDUCATIONAL AND ACADEMIC PURPOSES	1,000
ELK HILL PO BOX 99 GOOCHLAND,VA 23063	NONE	PC	EDUCATIONAL AND ACADEMIC PURPOSES	1,000
Total  3a				209,644

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				
JEFFERSON AREA BOARD FOR AGING INC 674 HILLSDALE DRIVE SUITE 9 CHARLOTTESVILLE,VA 22901	NONE	PC	SENIOR CITIZEN PROGRAMS	1,000
THE NATURE CONSERVANCY 4245 N FAIRFAX DRIVE SUITE 100 ARLINGTON,VA 22203	NONE	PC	NATURE PRESERVATION	1,000
PLANNED PARENTHOOD ADVOCATED OF VIRGINIA 201 N HAMILTON STREET RICHMOND,VA 23221	NONE	PC	REPRODUCTIVE HEALTH CARE AND FAMILY PLANNING	2,000
RONALD MCDONALD HOUSE CHARITIES 300 9TH STREET SW CHARLOTTESVILLE,VA 22903	NONE	PC	SUPPORT FOR FAMILIES WITH SICK CHILDREN	2,000
SERVICE DOGS OF VIRGINIA 811 PRESTON AVENUE CHARLOTTESVILLE,VA 22902	NONE	PC	SERVICE DOG TRAINING AND SUPPORT SERVICES	3,000
SPECIAL OLYMPICS OF GEORGIA 4000 DEKALB TECH PARKWAY ATLANTA,GA 30340	NONE	PC	SUPPORT OF INDIVIDUALS WITH DISABILITIES	2,000
VIRGINIA INSTITUTE OF AUTISM PO BOX 6127 CHARLOTTESVILLE,VA 22906	NONE	PC	SUPPORT PROGRAMS FOR AUTISTIC CHILDREN AND THEIR FAMILIES	2,000
FAIRHUNT FARM PO BOX 819 SCOTTSVILLE,VA 24590	NONE	PC	SPECIAL NEEDS & YOUTH EMPOWERMENT PROGRAMS	2,000
NORTH GARDEN FIRE COMPANY 4907 PLANK ROAD PO BOX 33 NORTH GARDEN,VA 22959	NONE	PC	VOLUNTEER FIRE AND RESCUE SUPPORT	3,000
YOUNG LIFE PO BOX 520 COLORADO SPRINGS,CO 80901	NONE	PC	RELIGIOUS PURPOSES	2,000
Total  3a				209,644

Attachment
Sequence No **12A**

13-3394681

Note. If you checked Box A 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 short-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 1a; you are not required to report these transactions on Form 8949 (see instructions).

☒ (C) Short-term transactions not reported to you on Form 1099-B

Note. If you checked Box A 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.

Social security number or taxpayer identification number
13-3394681

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.

Part II Long-Term. Transactions involving capital assets you held more than 1 year are long term. For short-term transactions, see page 1.

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).

You must check Box D, E, or F below. Check only one box. If more than one box applies for your long-term transactions, complete a separate Form 8949, page 2, for each applicable box. If you have more long-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need.

☐ **(D)** Long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see **Note** above)

☒ (E) Long-term transactions reported on Form(s) 1099-B showing basis was **not** reported to the IRS

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

1	(a) Description of property <i>(Example 100 sh XYZ Co.)</i>	(b) Date acquired (Mo , day, yr)	(c) Date sold or disposed (Mo , day, yr)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis See the Note below and see <i>Column (e)</i> in the separate instructions	Adjustment, if any, to gain or loss If you enter an amount in column (g), enter a code in column (f) See the separate instructions		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s) from instructions	(g) Amount of adjustment	
	PUBLICLY TRA			1,315,871	(744,361)		3	571,513
2 Totals Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts) Enter each total here and include on your Schedule D, line 8b (if Box D above is checked), line 9 (if Box E above is checked), or line 10 (if Box F above is checked)				1,315,871	(744,361)		3	571,513

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: WHITNEY AND ANNE STONE FOUNDATION

EIN: 13-3394681

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	15,832	7,916		7,916

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

TY 2014 Depreciation Schedule

Name: WHITNEY AND ANNE STONE FOUNDATION

EIN: 13-3394681

**TY 2014 Investments Corporate
Bonds Schedule****Name:** WHITNEY AND ANNE STONE FOUNDATION**EIN:** 13-3394681

Name of Bond	End of Year Book Value	End of Year Fair Market Value
PORTFOLIO INVESTMENTS	98,850	97,765

TY 2014 Investments Corporate Stock Schedule

Name: WHITNEY AND ANNE STONE FOUNDATION

EIN: 13-3394681

Name of Stock	End of Year Book Value	End of Year Fair Market Value
PORTFOLIO INVESTMENTS	954,456	1,175,461

TY 2014 Investments - Other Schedule

Name: WHITNEY AND ANNE STONE FOUNDATION

EIN: 13-3394681

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
SILVERCREST SELECT GROWTH EQ.	AT COST	373,083	662,755

TY 2014 Other Decreases Schedule

Name: WHITNEY AND ANNE STONE FOUNDATION

EIN: 13-3394681

Description	Amount
TIMING DIFF/OTHER FUND BALANCE DECREASES	83,079

TY 2014 Other Expenses Schedule

Name: WHITNEY AND ANNE STONE FOUNDATION

EIN: 13-3394681

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ADMINISTRATION EXPENSES	356			

TY 2014 Other Income Schedule

Name: WHITNEY AND ANNE STONE FOUNDATION

EIN: 13-3394681

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
PORTFOLIO INCOME-SILVERCREST SEL GROWTH	41	41	
NONDIVIDEND DISTRIBUTIONS	2,309		

TY 2014 Other Professional Fees Schedule

Name: WHITNEY AND ANNE STONE FOUNDATION

EIN: 13-3394681

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT FEES	23,713	11,857		11,856
CUSTODY FEES	1,383	691		692
PORTFOLIO EXP-SILVERCREST SELE	8,716	4,358		4,358

TY 2014 Taxes Schedule**Name:** WHITNEY AND ANNE STONE FOUNDATION**EIN:** 13-3394681

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
2014 - 4Q ESTIMATED TAX	8,500			
2013 EXTENSION PAYMENT 990-PF	3,000			
FOREIGN TAX PD-SILVERCREST SEL	52			