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EXTENDED TO AUGUST 17, 2015

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 separate instructions is at www.irs.gov/form990pf.

OMB No. 1545-0052

2014

Open to Public Inspection

Form 990-PF

Department of the Treasury
Internal Revenue Service

For calendar year 2014 or tax year beginning

, and ending

Name of foundation

JOHN & BARBARA SAMUELSON FOUNDATION, INC

A Employer identification number

13-4045935

Number and street (or P O box number if mail is not delivered to street address)

Room/suite

C/O PRAGER METIS CPAS LLC 675 THIRD AVE

B Telephone number

2129727555

City or town, state or province, country, and ZIP or foreign postal code

NEW YORK, NY 10017

C If exemption application is pending, check here ☐

G Check all that apply:

☐ Initial return☐ Initial return of a former public charity☐ Final return☐ Amended return☐ Address change☐ Name changeD 1. Foreign organizations, check here ☐2. Foreign organizations meeting the 85% test, check here and attach computation ☐

H Check type of organization:

☒ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust☐ Other taxable private foundationE If private foundation status was terminated under section 507(b)(1)(A), check here ☐

I Fair market value of all assets at end of year

J Accounting method:

☒ Cash☐ Accrual

(from Part II, col. (c), line 16)

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

\$ 768,476. (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))

(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	16,850.		N/A	
	2 Check ☐ If the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	5.	5.		STATEMENT 1
	4 Dividends and interest from securities	15,750.	15,750.		STATEMENT 2
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	111,124.			
	b Gross sales price for all assets on line 6a	182,395.			
	7 Capital gain net income (from Part IV, line 2)		111,124.		
	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)				
	11 Other income				
	12 Total Add lines 1 through 11	143,729.	126,879.		
	13 Compensation of officers, directors, trustees, etc	0.	0.		0.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees				
	b Accounting fees STMT 3	2,850.	285.		2,565.
	c Other professional fees				
	17 Interest				
	18 Taxes STMT 4	1,649.	77.		0.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses STMT 5	305.	305.		0.
	24 Total operating and administrative expenses. Add lines 13 through 23	4,804.	667.		2,565.
	25 Contributions, gifts, grants paid	194,750.			194,750.
	26 Total expenses and disbursements. Add lines 24 and 25	199,554.	667.		197,315.
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	-55,825.			
	b Net investment income (if negative, enter -0-)		126,212.		
	c Adjusted net income (if negative, enter -0-)			N/A	

423501
11-24-14

LHA For Paperwork Reduction Act Notice, see instructions.

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SCANNED SEP 16 2015

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		
		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	75,769.	74,227.	74,227.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock STMT 6	185,674.	131,391.	694,249.
	c Investments - corporate bonds			
	11 Investments - land, buildings, and equipment basis ▶			
Liabilities	Less: accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other			
	14 Land, buildings, and equipment: basis ▶			
	Less: accumulated depreciation ▶			
	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)	261,443.	205,618.	768,476.
	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
Net Assets or Fund Balances	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	0.	0.	
	Foundations that follow SFAS 117, check here ▶ ☐			
	and complete lines 24 through 26 and lines 30 and 31			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒			
	and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	261,443.	205,618.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	0.	0.	
	30 Total net assets or fund balances	261,443.	205,618.	
	31 Total liabilities and net assets/fund balances	261,443.	205,618.	

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	261,443.
2 Enter amount from Part I, line 27a	2	-55,825.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	205,618.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	205,618.

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				
b SEE ATTACHED STATEMENTS				
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			
b			
c			
d			
e 182,395.		71,271.	111,124.

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			
b			
c			
d			
e			111,124.

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	111,124.
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). If (loss), enter -0- in Part I, line 8	{		3	N/A

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2013	95,235.	799,268.	.119153
2012	141,607.	448,382.	.315818
2011	187,014.	349,501.	.535089
2010	161,216.	324,924.	.496165
2009	109,270.	268,350.	.407192

2 Total of line 1, column (d)	2	1.873417
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	.374683
4 Enter the net value of noncharitable-use assets for 2014 from Part X, line 5	4	837,399.
5 Multiply line 4 by line 3	5	313,759.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	1,262.
7 Add lines 5 and 6	7	315,021.
8 Enter qualifying distributions from Part XII, line 4	8	197,315.

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

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

1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1 Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		1	2,524.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b			
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	2,524.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	2,524.
6 Credits/Payments:			
a 2014 estimated tax payments and 2013 overpayment credited to 2014	6a 1,840.		
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c 3,500.		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d		7	5,340.
8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached		8	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid		10	2,816.
11 Enter the amount of line 10 to be: Credited to 2015 estimated tax ☐ 2,816. Refunded ☐		11	0.

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. \$ 0. (2) On foundation managers. \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☐ NY		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address N/A	13	X	
14	The books are in care of PRAGER METIS CPAS LLC Telephone no. 212-972-7555 Located at 675 THIRD AVENUE, , NEW YORK, NY ZIP+4 10017			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year	15	N/A	
16	At any time during calendar year 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 the instructions for exceptions and filing requirements for FinCEN Form 114, (formerly TD F 90-22.1). If "Yes," enter the name of the foreign country	16	Yes	No
				X

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

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

		Yes	No
1a	During the year did the foundation (either directly or indirectly):		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ 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 N/A	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	X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a	At the end of tax year 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? ☐ Yes ☒ No If "Yes," list the years		
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) N/A	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.		
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.) N/A	3b	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2014?	4b	X

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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)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☒

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

N/A

☐ Yes ☐ No

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

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

☐ Yes ☒ No

6b

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

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?

N/A

7b

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (if not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
JOHN SAMUELSON	DIRECTOR			
132 EAST 72ND STREET				
NEW YORK, NY 10021	0.00	0.	0.	0.
BARBARA SAMUELSON	DIRECTOR			
132 EAST 72ND STREET				
NEW YORK, NY 10021	0.00	0.	0.	0.
CHARLES A. SAMUELSON	DIRECTOR			
142 EAST 71ST STREET, APT 8A				
NEW YORK, NY 10021	0.00	0.	0.	0.
RICHARD A. SAMUELSON	DIRECTOR			
1488 OAKDALE STREET				
PASADENA, CA 91106	0.00	0.	0.	0.

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

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

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

0

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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. If none, enter "NONE."

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

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

0

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 NONE	
	0.
2	
3	
4	

Part IX-B Summary of Program-Related Investments

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

	Amount
1 NONE	
	0.
2	
All other program-related investments. See instructions.	
3 NONE	
	0.
	0.
Total. Add lines 1 through 3	0.

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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	786,517.
b	Average of monthly cash balances	1b	63,634.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	850,151.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	850,151.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	12,752.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	837,399.
6	Minimum investment return. Enter 5% of line 5	6	41,870.

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	41,870.
2a	Tax on investment income for 2014 from Part VI, line 5	2a	2,524.
b	Income tax for 2014. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	2,524.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	39,346.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	39,346.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	39,346.

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	197,315.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	197,315.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	197,315.

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.

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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				39,346.
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2014:				
a From 2009	96,548.			
b From 2010	147,038.			
c From 2011	171,621.			
d From 2012	121,269.			
e From 2013	57,104.			
f Total of lines 3a through e	593,580.			
4 Qualifying distributions for 2014 from Part XII, line 4: ▶ \$	197,315.			
a Applied to 2013, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2014 distributable amount				39,346.
e Remaining amount distributed out of corpus	157,969.			
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:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	751,549.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2013. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
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)	0.			
8 Excess distributions carryover from 2009 not applied on line 5 or line 7	96,548.			
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a	655,001.			
10 Analysis of line 9:				
a Excess from 2010	147,038.			
b Excess from 2011	171,621.			
c Excess from 2012	121,269.			
d Excess from 2013	57,104.			
e Excess from 2014	157,969.			

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

N/A

- 1 a** 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 foundation is a private operating foundation described in section

☐ 4942(j)(3) or ☐ 4942(j)(5)

- 2 a** Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

b 85% of line 2a

c Qualifying distributions from Part XII,
line 4 for each year listed

d Amounts included in line 2c not used directly for active conduct of exempt activities

e Qualifying distributions made directly for active conduct of exempt activities.

- 3** Complete 3a, b, or c for the alternative test relied upon:

a "Assets" alternative test - enter:

(1) Value of all assets

(2) Value of assets qualifying under section 4942(j)(3)(B)(i)

b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed

c "Support" alternative test - enter:

(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)

(3) Largest amount of support from an exempt organization

(4) Gross investment income

Part XV	Supplementary Information (Complete this part only if the foundation 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).)

SEE STATEMENT 7

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.

NONE

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

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

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

N/A

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

c Any submission deadlines?

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

Part XV Supplementary Information (continued)**3** Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
SEE STMT A				194,750.
Total			▶ 3a	194,750.
b Approved for future payment				
NONE				
Total			▶ 3b	0.

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

- | | | Yes | No |
|----------|--|--------------|----------|
| 1 | Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations? | | |
| a | Transfers from the reporting foundation to a noncharitable exempt organization of: | | |
| | (1) Cash | 1a(1) | X |
| | (2) Other assets | 1a(2) | X |
| b | Other transactions: | | |
| | (1) Sales of assets to a noncharitable exempt organization | 1b(1) | X |
| | (2) Purchases of assets from a noncharitable exempt organization | 1b(2) | X |
| | (3) Rental of facilities, equipment, or other assets | 1b(3) | X |
| | (4) Reimbursement arrangements | 1b(4) | X |
| | (5) Loans or loan guarantees | 1b(5) | X |
| | (6) Performance of services or membership or fundraising solicitations | 1b(6) | X |
| c | Sharing of facilities, equipment, mailing lists, other assets, or paid employees | 1c | X |
| d | If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received. | | |

[illegible]

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

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

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				May the IRS discuss this return with the preparer shown below (see instr 7)? ☒ Yes ☐ No
	Signature of officer or trustee <i>Babur S. Samadov</i>		Date <i>9/8/15</i>	Title <i>President</i>	
Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature <i>[Signature]</i>	Date <i>8/6/15</i>	Check ☐ if self-employed	PTIN
	GABE WOLOSKY				P00081940
	Firm's name ▶ PRAGER METIS CPAS, LLC	Firm's EIN ▶ 06-1667465			
	Firm's address ▶ 675 THIRD AVE 3FL NEW YORK, NY 10017			Phone no. 212-972-7555	

Form 990-PF (2014)

Schedule B(Form 990, 990-EZ,
or 990-PF)Department of the Treasury
Internal Revenue Service**Schedule of Contributors**

▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.
▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and
its instructions is at www.irs.gov/form990.

OMB No 1545-0047

2014

Name of the organization

JOHN & BARBARA SAMUELSON FOUNDATION, INC

Employer identification number

13-4045935

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

☐ 501(c)() (enter number) organization☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation☐ 501(c)(3) taxable private foundationCheck if your organization is covered by the **General Rule** or a **Special Rule**.**Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.**General Rule**

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year. ▶ \$ _____

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2014)

Name of organization	Employer identification number
JOHN & BARBARA SAMUELSON FOUNDATION, INC	13-4045935

Part I Contributors (see instructions) Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	JOHN & BARBARA SAMUELSON 132 EAST 72 STREET NEW YORK, NY 10021	\$ 16,850.	Person ☒ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)

Employer identification number

13-4045935

Part II Noncash Property (see instructions) Use duplicate copies of Part II if additional space is needed

[illegible]

Name of organization	Employer identification number
JOHN & BARBARA SAMUELSON FOUNDATION, INC	13-4045935

Part III Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year (Enter this info once) ▶ \$ _____

Use duplicate copies of Part III if additional space is needed

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
(e) Transfer of gift			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	
(e) Transfer of gift			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	
(e) Transfer of gift			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	
(e) Transfer of gift			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
MERRILL LYNCH	5.	5.	
TOTAL TO PART I, LINE 3	5.	5.	

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
MERRILL LYNCH- CMA	15,750.	0.	15,750.	15,750.	
TO PART I, LINE 4	15,750.	0.	15,750.	15,750.	

FORM 990-PF ACCOUNTING FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
	2,850.	285.		2,565.
TO FORM 990-PF, PG 1, LN 16B	2,850.	285.		2,565.

FORM 990-PF TAXES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES PAID	77.	77.		0.
FEDERAL TAX PAID	1,572.	0.		0.
TO FORM 990-PF, PG 1, LN 18	1,649.	77.		0.

FORM 990-PF	OTHER EXPENSES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FILING FEES	240.	240.		0.	
INVESTMENT FEES	65.	65.		0.	
TO FORM 990-PF, PG 1, LN 23	305.	305.		0.	

FORM 990-PF	CORPORATE STOCK		STATEMENT	6
DESCRIPTION	BOOK VALUE		FAIR MARKET VALUE	
CORPORATE STOCK	131,391.		694,249.	
TOTAL TO FORM 990-PF, PART II, LINE 10B	131,391.		694,249.	

FORM 990-PF	PART XV - LINE 1A LIST OF FOUNDATION MANAGERS	STATEMENT	7
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NAME OF MANAGER

JOHN SAMUELSON
BARBARA SAMUELSON

Form 990-PF, Part XV - Supplementary Information, #3a - Grants and Contributions Paid During the Year or Approved for Future Payment

<u>Recipient</u>	<u>Address</u>	<u>Relationship</u>	<u>Date</u>	<u>Purpose</u>	<u>Amount</u>
JAMES LENOX HOUSE ASSN	49 E 73rd St, New York, NY 10021	NONE	1/20/2014	UNRESTRICTED	1,500.00
CARNEGIE HALL	881 7th Ave, New York, NY 10019	NONE	2/4/2014	UNRESTRICTED	2,000.00
METROPOLITAN MUSEUM OF ART	1000 5th Ave, New York, NY 10028	NONE	2/10/2014	UNRESTRICTED	550.00
TEMPLE SHAARAY TEFILA	250 East, 79th Street, New York, NY 10075	NONE	2/12/2014	UNRESTRICTED	5,000.00
SUNY DOWNSTATE MEDICAL CENTER	450 Clarkson Avenue, Box 93, Brooklyn, NY 11203	NONE	2/12/2014	UNRESTRICTED	20,000.00
WESTPORT COUNTY PLAYHOUSE	25 Powers Court, Westport, Connecticut 06880	NONE	2/26/2014	UNRESTRICTED	25,000.00
METROPOLITAN MUSEUM OF ART	1000 5th Ave, New York, NY 10028	NONE	3/10/2014	UNRESTRICTED	6,000.00
ROUNDABOUT THEATRE COMPANY	231 West 39th Street, Suite 1200, New York, NY 10018	NONE	4/11/2014	UNRESTRICTED	2,000.00
BIG BROTHERS BIG SISTERS OF NY	223 E 30th St, New York, NY 10016	NONE	4/12/2014	UNRESTRICTED	1,000.00
LOWER EAST SIDE TENEMENT MUSEUM	103 Orchard St, New York, NY 10002	NONE	4/12/2014	UNRESTRICTED	500.00
ROUNDABOUT THEATRE COMPANY	231 West 39th Street, Suite 1200, New York, NY 10018	NONE	4/21/2014	UNRESTRICTED	500.00
WHEATON COLLEGE	501 College Avenue, Wheaton, IL 60187	NONE	4/22/2014	UNRESTRICTED	10,000.00
NEW YORK PHILHARMONIC	10 Lincoln Center Plaza, New York, NY 10023-6970	NONE	5/11/2014	UNRESTRICTED	3,000.00
ROUNDABOUT THEATRE COMPANY	231 West 39th Street, Suite 1200, New York, NY 10018	NONE	5/11/2014	UNRESTRICTED	3,000.00
BLYTHEDALE CHILDREN'S HOSPITAL	95 Bradhurst Ave, Valhalla, NY 10595	NONE	5/11/2014	UNRESTRICTED	250.00
CENTRAL PARK CONSERVANCY	14 E 60th St, New York, NY 10022	NONE	5/17/2014	UNRESTRICTED	250.00
RONALD MCDONALD & NYI	One Kroc Drive, Oak Brook, IL 60523	NONE	6/10/2014	UNRESTRICTED	5,000.00
WESTPORT COUNTY PLAYHOUSE	25 Powers Court, Westport, Connecticut 06880	NONE	6/20/2014	UNRESTRICTED	200.00
CONGREGATION EMANUEL OF NEW YORK	1 E 68th St, New York, NY 10065	NONE	6/26/2014	UNRESTRICTED	1,000.00
THE NEW YORK BOTANICAL GARDEN	2900 Southern Blvd, Bronx, NY 10458	NONE	7/11/2014	UNRESTRICTED	1,000.00
THE NEW YORK BOTANICAL GARDEN	2900 Southern Blvd, Bronx, NY 10458	NONE	7/8/2014	UNRESTRICTED	500.00
GREATER NEW YORK COUNCILS, BOY SCOUTS OF AMERICA	350 5th Avenue #7820, New York, NY 10118	NONE	7/15/2014	UNRESTRICTED	500.00
THE ACTORS FUND	729 7th Avenue 10th floor, New York, NY 10019	NONE	7/16/2014	UNRESTRICTED	1,000.00
TEMPLE SHAARAY TEFILA	250 East, 79th Street, New York, NY 10075	NONE	8/18/2014	UNRESTRICTED	10,000.00
WESTPORT COUNTY PLAYHOUSE	25 Powers Court, Westport, Connecticut 06880	NONE	9/2/2014	UNRESTRICTED	5,000.00
JAMES LENOX HOUSE ASSN	49 E 73rd St, New York, NY 10021	NONE	9/8/2014	UNRESTRICTED	2,500.00
WESTPORT COUNTY PLAYHOUSE	25 Powers Court, Westport, Connecticut 06880	NONE	9/10/2014	UNRESTRICTED	18,000.00
RONALD MCDONALD & NYI	One Kroc Drive, Oak Brook, IL 60523	NONE	9/16/2014	UNRESTRICTED	1,000.00
MUSEUM AT ELDRIDGE STREET MUSEUM	12 Eldridge St, New York, NY 10002	NONE	9/22/2014	UNRESTRICTED	2,000.00
AMERICAN ISRAEL CULTURAL FOUNDATION	20 East, 46th Street, 15th floor, New York, NY 10017	NONE	9/26/2014	UNRESTRICTED	25,000.00
PACIFIC RESEARCH INSTITUTE	One Embarcadero Center, Suite 350, San Francisco, CA 94111	NONE	10/1/2014	UNRESTRICTED	1,000.00
AMERICAN JEWISH COMMITTEE	165 E 56th St, New York, NY 10022	NONE	10/10/2014	UNRESTRICTED	250.00
JEWISH MUSEUM	1109 5th Ave, New York, NY 10128	NONE	10/24/2014	UNRESTRICTED	2,500.00
NEW YORK HISTORICAL SOCIETY	170 Central Park West, New York, NY 10024-5194	NONE	10/24/2014	UNRESTRICTED	2,500.00
BLYTHEDALE CHILDREN'S HOSPITAL	95 Bradhurst Ave, Valhalla, NY 10595	NONE	11/4/2014	UNRESTRICTED	250.00
CLAREMONT INSTITUTE	937 W Foothill Blvd Ste E, Claremont, CA 91711	NONE	12/15/2014	UNRESTRICTED	2,000.00
THE HOLE IN THE WALL GANG CAMP	565 Ashford Center Road, Ashford, CT 06278	NONE	12/15/2014	UNRESTRICTED	2,500.00
LOWER EAST SIDE TENEMENT MUSEUM	103 Orchard St, New York, NY 10002	NONE	12/15/2014	UNRESTRICTED	1,000.00
JAMES LENOX HOUSE ASSN	49 E 73rd St, New York, NY 10021	NONE	12/15/2014	UNRESTRICTED	5,000.00
NATIONAL JEWISH HEALTH	271 Madison Avenue, 19th Floor, New York, NY 10016	NONE	12/15/2014	UNRESTRICTED	2,000.00
RONALD MCDONALD & NYI	One Kroc Drive, Oak Brook, IL 60523	NONE	12/15/2014	UNRESTRICTED	10,000.00
UJA - FEDERATION NEW YORK	130 E 59th St, New York, NY 10022	NONE	12/15/2014	UNRESTRICTED	1,000.00
PACIFIC RESEARCH INSTITUTE	One Embarcadero Center, Suite 350, San Francisco, CA 94111	NONE	12/15/2014	UNRESTRICTED	2,000.00
FRAXA RESEARCH FOUNDATION	10 Prince Place, Suite 203, Newburyport, MA 01950	NONE	12/15/2014	UNRESTRICTED	1,000.00
MOUNT SINAI HOSPITAL	1 Gustave L Levy Pl #1030, New York, NY 10029	NONE	12/15/2014	UNRESTRICTED	1,000.00
PASADENA JEWISH TEMPLE AND CENTER	1434 N Altadena Dr, Pasadena, CA 91107	NONE	12/16/2014	UNRESTRICTED	2,500.00
COUNCIL ON THE ENVIRONMENT OF NEW YORK CITY	625 Broadway, 9th Floor, Albany, NY 12233-7253	NONE	12/16/2014	UNRESTRICTED	5,000.00

194,750.00

John & Barbara Samuelson Foundation, Inc.

December 31, 2014

<u>No. of shs. Stock Donated in 2014</u>	<u>FMV</u>
200 Shs Union Pacific Corp	21,700
200 Shs SPDR Gold Trust	23,520
	<u>\$ 45,220</u>

Form 990-PF, Part II - Balance Sheets, #10b: Investments - corporate stock

Description	End of Year	
	Book Value	Fair Market Value
Abbott Labs	5,076	18,008
Aegon N.V. NY	918	1,103
AMC Networks Inc Shs	-	14,348
Bank of America Corp	542	6,136
Cablevision	-	18,576
Conocophillips	3,037	8,149
Conocophillips	2,106	5,663
EMC Corporation	3,625	14,870
Exxon Mobil Corp	935	7,766
Exxon Mobil Corp	17,209	46,225
Ecolab Inc	4,958	10,452
Edwards Lifesciences Corp	163	10,190
IBM	9,115	112,308
Johnson and Johnson Com	6,731	41,828
Motors Liq		385
Napco Security Tech Inc	728	5,170
Napco Security Tech Inc	3,572	25,380
Napco Security Tech Inc	3,572	25,380
Napco Security Tech Inc	1,786	12,690
Napco Security Tech Inc	714	5,076
Napco Security Tech Inc	714	5,076
Napco Security Tech Inc	357	2,538
Phillips	2,234	12,189
Phillips	458	2,151
Procter & Gamble & Co.	616	81,981
Procter & Gamble & Co.	274	36,436
Royal Dutch Shell PLC	4,069	13,390
Schlumberger Ltd	10,014	42,705
Tractor Supply Co	5,852	23,646
Viacom Inc. Cl B	3,199	5,418
General Motors Co		51
General Motors Co		75
Gabelli G Multimedia TR	22,865	30,030
Tekla Life Sciences	12,158	24,880
General Motors Co		34
General Motors Co		50
General Motors Co		70
Union Pacific Corp	3,893	23,826
Total	131,490	\$ 694,249

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	126 SHS. GENERAL MOTORS CO	P	VARIOUS	03/14/14
b	500 SHS. AT & T INC	P	04/27/07	10/23/14
c	100 SHS. CONOCOPHILLIPS	P	10/28/03	12/10/14
d	500 SHS. EXXON MOBIL CORP	P	12/27/90	12/10/14
e	200 SHS. FREEPRT-MCMRAN CPR	P	12/21/01	03/10/14
f	334 SHS. GABELLI MULTIMEDIA TRUST	P	10/07/04	12/10/14
g	77 SHS. GENERAL MOTORS CO	P	06/11/08	03/14/14
h	548 SHS. TEKLA LIFE SCIENCES	P	06/12/08	12/10/14
i	5,000 SHS. NAPCO SECURITY TECH INC	P	10/06/99	03/10/14
j	300 SHS. TRACTOR SUPPLY CO	P	10/28/10	03/10/14
k	3,336 SHS. THE GABELLI MUTLTIMEDIA PARENT	P	06/20/14	07/11/14
l	GENERAL MOTORS-CASH IN LIEU	P	01/10/14	01/10/14
m	GENERAL MOTORS-CASH IN LIEU	P	11/25/14	11/25/14
n	4 SHS. GENERAL MOTORS	P	12/27/13	03/14/14
o	GENERAL MOTORS-CASH IN LIEU	P	01/10/14	01/10/14

(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 4,247.		4,015.	232.
b 16,617.		19,598.	-2,981.
c 6,217.		2,574.	3,643.
d 44,087.		5,563.	38,524.
e 6,116.		1,944.	4,172.
f 3,222.		2,546.	676.
g 2,595.		6,387.	-3,792.
h 14,061.		6,527.	7,534.
i 34,078.		3,308.	30,770.
j 21,560.		5,852.	15,708.
k 525.			525.
l 9.			9.
m 11.			11.
n 135.			135.
o 19.			19.

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			232.
b			-2,981.
c			3,643.
d			38,524.
e			4,172.
f			676.
g			-3,792.
h			7,534.
i			30,770.
j			15,708.
k			525.
l			9.
m			11.
n			135.
o			19.

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7
If (loss), enter "-0-" in Part I, line 7 }

2

3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):
If gain, also enter in Part I, line 8, column (c).
If (loss), enter "-0-" in Part I, line 8

3

JOHN & BARBARA SAMUELSON FOUNDATION, INC

13-4045935

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2

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	GENERAL MOTORS-CASH IN LIEU	P	11/25/14	11/25/14
b	GENERAL MOTORS-CASH IN LIEU	P	01/10/14	01/10/14
c	GENERAL MOTORS-CASH IN LIEU	P	11/25/14	11/25/14
d	200 SHS. SPDR GOLD TRUST	D	04/02/07	09/24/14
e	CAPITAL GAIN DISTRIBUTION	P		
f				
g				
h				
i				
j				
k				
l				
m				
n				
o				

(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 2.			2.
b 26.			26.
c 3.			3.
d 23,191.		12,957.	10,234.
e 5,674.			5,674.
f			
g			
h			
i			
j			
k			
l			
m			
n			
o			

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			2.
b			26.
c			3.
d			10,234.
e			5,674.
f			
g			
h			
i			
j			
k			
l			
m			
n			
o			

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	111,124.
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). If (loss), enter "-0-" in Part I, line 8 }	3	N/A

Application for Extension of Time To File an Exempt Organization Return

OMB No 1545-1709

Department of the Treasury
Internal Revenue Service

► File a separate application for each return.

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

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

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

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

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

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

Part I only

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

		Enter filer's identifying number
Type or print	Name of exempt organization or other filer, see instructions	Employer identification number (EIN) or
	JOHN & BARBARA SAMUELSON FOUNDATION, INC	13-4045935
File by the due date for filing your return. See instructions	Number, street, and room or suite no. If a P O box, see instructions	Social security number (SSN)
	C/O PRAGER METIS CPAS LLC 675 THIRD AVE, City, town or post office, state, and ZIP code For a foreign address, see instructions NEW YORK, NY 10017	

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

04

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

PRAGER METIS CPAS LLC

- The books are in the care of ► 675 THIRD AVENUE, - NEW YORK, NY 10017

Telephone No ► 212-972-7555

Fax No ►

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

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until **AUGUST 15, 2015** , to file the exempt organization return for the organization named above The extension is for the organization's return for:
 ► ☒ calendar year **2014** or
 ► ☐ tax year beginning , and ending

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

3a If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits See instructions	3a	\$	5,340.
b If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made Include any prior year overpayment allowed as a credit	3b	\$	1,840.
c Balance due. Subtract line 3b from line 3a Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System) See instructions	3c	\$	3,500.

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