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**Return of Private Foundation**

Department of the Treasury  
Internal Revenue Service

or Section 4947(a)(1) Trust Treated as Private Foundation

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**2014**

Open to Public Inspection

For calendar year **2014** or tax year beginning , **2014**, and ending , **20**

Name of foundation <b>THE SARA SMITH SELF FOUNDATION, INC.</b>		<b>A Employer identification number</b> 20-3631059
Number and street (or P.O. box number if mail is not delivered to street address) <b>1001 WEST FOURTH STREET</b>	Room/suite	<b>B Telephone number (see instructions)</b> (336) 607-7314
City or town, state or province, country, and ZIP or foreign postal code <b>WINSTON-SALEM, NC 27101</b>		<b>C</b> If exemption application is pending, check here <input type="checkbox"/>
<b>G</b> Check all that apply:	<input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change	<input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change
<b>H</b> Check type of organization		<b>D</b> 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
<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		<b>E</b> If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
<b>I</b> Fair market value of all assets at end of year (from Part II, col. (c), line 16) <b>\$ 3,872,153.</b>	<b>J</b> Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	<b>F</b> If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

<b>Part I Analysis of Revenue and Expenses</b> (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)
<b>1</b>	Contributions, gifts, grants, etc., received (attach schedule)				
<b>2</b>	Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
<b>3</b>	Interest on savings and temporary cash investments				
<b>4</b>	Dividends and interest from securities	94,262.	94,262.		ATCH 1
<b>5a</b>	Gross rents	48.	48.		
<b>b</b>	Net rental income or (loss)				
<b>6a</b>	Net gain or (loss) from sale of assets not on line 10	39,731.			
<b>b</b>	Gross sales price for all assets on line 6a	1,208,944.			
<b>7</b>	Capital gain net income (from Part IV, line 2)		39,731.		
<b>8</b>	Net short-term capital gain				
<b>9</b>	Income modifications				
<b>10a</b>	Gross sales less returns and allowances				
<b>b</b>	Less Cost of goods sold				
<b>c</b>	Gross profit or (loss) (attach schedule)				
<b>11</b>	Other income (attach schedule) ATCH 2	-8,002.	-8,002.		
<b>12</b>	<b>Total.</b> Add lines 1 through 11	126,039.	126,039.		
<b>13</b>	Compensation of officers, directors, trustees, etc.	0			
<b>14</b>	Other employee salaries and wages				
<b>15</b>	Pension plans, employee benefits				
<b>16a</b>	Legal fees (attach schedule) ATCH 3	22,929.	22,929.		
<b>b</b>	Accounting fees (attach schedule)				
<b>c</b>	Other professional fees (attach schedule) [4]	22,175.	22,175.		
<b>17</b>	Interest				
<b>18</b>	Taxes (attach schedule) (see instructions)				
<b>19</b>	Depreciation (attach schedule) and depletion				
<b>20</b>	Occupancy				
<b>21</b>	Travel, conferences, and meetings				
<b>22</b>	Printing and publications				
<b>23</b>	Other expenses (attach schedule)				
<b>24</b>	<b>Total operating and administrative expenses.</b> Add lines 13 through 23	45,104.	45,104.		
<b>25</b>	Contributions, gifts, grants paid	170,000.			170,000.
<b>26</b>	<b>Total expenses and disbursements.</b> Add lines 24 and 25	215,104.	45,104.	0	170,000.
<b>27</b>	Subtract line 26 from line 12:				
<b>a</b>	Excess of revenue over expenses and disbursements	-89,065.			
<b>b</b>	Net investment income (if negative, enter -0-)		80,935.		
<b>c</b>	Adjusted net income (if negative, enter -0-)				

SCANNED AUG 19 2015

Operating and Administrative Expenses

AUG 18 2015

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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	201.	310.	310.
	2	Savings and temporary cash investments	95,579.	335,038.	335,038.
	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) [5]		164,690.	164,666.
	b	Investments - corporate stock (attach schedule) ATCH 6	2,021,047.	1,450,898.	2,075,160.
	c	Investments - corporate bonds (attach schedule) ATCH 7	1,027,993.	695,991.	698,499.
	11	Investments - land, buildings, and equipment basis			
	Less: accumulated depreciation (attach schedule)				
12	Investments - mortgage loans				
13	Investments - other (attach schedule) ATCH 8	59,441.	153,558.	235,916.	
14	Land, buildings, and equipment basis				
	Less: accumulated depreciation (attach schedule)				
15	Other assets (describe ATCH 9)		315,891.	362,564.	
16	<b>Total assets</b> (to be completed by all filers - see the instructions Also, see page 1, item I)	3,204,261.	3,116,376.	3,872,153.	
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	<b>Total liabilities</b> (add lines 17 through 22)	0	0		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. <input type="checkbox"/>				
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. <input checked="" type="checkbox"/>				
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg, and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	3,204,261.	3,116,376.	
30	<b>Total net assets or fund balances</b> (see instructions)	3,204,261.	3,116,376.		
31	<b>Total liabilities and net assets/fund balances</b> (see instructions)	3,204,261.	3,116,376.		

**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	3,204,261.
2	Enter amount from Part I, line 27a	2	-89,065.
3	Other increases not included in line 2 (itemize) ATCH 10	3	1,180.
4	Add lines 1, 2, and 3	4	3,116,376.
5	Decreases not included in line 2 (itemize)	5	
6	<b>Total net assets or fund balances at end of year</b> (line 4 minus line 5) - Part II, column (b), line 30	6	3,116,376.

**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 PART IV SCHEDULE			
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				
b				
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any		
a				
b				
c				
d				
e				
2	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	39,731.
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	0

**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	182,423.	3,678,293.	0.049594
2012	193,080.	3,563,452.	0.054183
2011	93,773.	3,527,122.	0.026586
2010	133,753.	3,420,240.	0.039106
2009	24,952.	710,467.	0.035121
2	Total of line 1, column (d)		0.204590
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		0.040918
4	Enter the net value of noncharitable-use assets for 2014 from Part X, line 5		3,904,173.
5	Multiply line 4 by line 3		159,751.
6	Enter 1% of net investment income (1% of Part I, line 27b)		809.
7	Add lines 5 and 6		160,560.
8	Enter qualifying distributions from Part XII, line 4 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.		170,000.

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

Table with 11 rows for excise tax calculations. Includes sub-rows 6a-6d for credits and payments. Total tax due is 3,822.

Part VII-A Statements Regarding Activities

Table with 10 rows of activity statements and a Yes/No column. Questions cover political activities, unrelated business income, and substantial contributors.

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).
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)
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address N/A
14 The books are in care of ROBERT L. EDWARDS Telephone no. 336-607-7314 Located at 1001 WEST FOURTH STREET WINSTON-SALEM, NC ZIP+4 27101
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? 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.
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 X No
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? Yes X No
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes X No
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes X 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 X 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 X 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)? 1b X
Organizations relying on a current notice regarding disaster assistance check here
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 X 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) 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 X 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 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

**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)?  Yes  No

Organizations relying on a current notice regarding disaster assistance check here

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?  Yes  No

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  Yes  No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  Yes  No

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

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?  Yes  No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?  Yes  No

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

**1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).**

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
ATCH 11		0	0	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
NONE				

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
NONE		
-----		
-----		
-----		
-----		

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

**Part IX-A** Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 N/A	
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 NONE	
2	
All other program-related investments. See instructions	
3 NONE	

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	3,648,057.
b	Average of monthly cash balances . . . . .	1b	118,172.
c	Fair market value of all other assets (see instructions) . . . . .	1c	197,398.
d	<b>Total</b> (add lines 1a, b, and c) . . . . .	1d	3,963,627.
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	
3	Subtract line 2 from line 1d . . . . .	3	3,963,627.
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions) . . . . .	4	59,454.
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4 . . . . .	5	3,904,173.
6	<b>Minimum investment return.</b> Enter 5% of line 5 . . . . .	6	195,209.

**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	195,209.
2a	Tax on investment income for 2014 from Part VI, line 5 . . . . .	2a	809.
b	Income tax for 2014. (This does not include the tax from Part VI.) . . . . .	2b	
c	Add lines 2a and 2b . . . . .	2c	809.
3	Distributable amount before adjustments. Subtract line 2c from line 1 . . . . .	3	194,400.
4	Recoveries of amounts treated as qualifying distributions . . . . .	4	
5	Add lines 3 and 4 . . . . .	5	194,400.
6	Deduction from distributable amount (see instructions) . . . . .	6	
7	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5 Enter here and on Part XIII, line 1 . . . . .	7	194,400.

**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	170,000.
b	Program-related investments - total from Part IX-B . . . . .	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes . . . . .	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required) . . . . .	3a	
b	Cash distribution test (attach the required schedule) . . . . .	3b	
4	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4 . . . . .	4	170,000.
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	809.
6	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4 . . . . .	6	169,191.

**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 . . . . .				194,400.
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only . . . . .				
b Total for prior years 20 <u>12</u> , 20 <u>11</u> , 20 <u>10</u> . . . . .				
3 Excess distributions carryover, if any, to 2014:				
a From 2009 . . . . .				
b From 2010 . . . . .				
c From 2011 . . . . .				
d From 2012 . . . . .			17,747.	
e From 2013 . . . . .			1,662.	
f Total of lines 3a through e . . . . .			19,409.	
4 Qualifying distributions for 2014 from Part XII, line 4: ▶ \$ <u>170,000.</u>				
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 . . . . .				170,000.
e Remaining amount distributed out of corpus . . . . .				
5 Excess distributions carryover applied to 2014 . . . . . (If an amount appears in column (d), the same amount must be shown in column (a).)	19,409.			19,409.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5 . . . . .				
b Prior years' undistributed income Subtract line 4b from line 2b . . . . .				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed . . . . .				
d Subtract line 6c from line 6b. Taxable amount - see instructions . . . . .				
e Undistributed income for 2013. Subtract line 4a from line 2a Taxable amount - see instructions . . . . .				
f Undistributed income for 2014 Subtract lines 4d and 5 from line 1. This amount must be distributed in 2015 . . . . .				4,991.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions) . . . . .				
8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions) . . . . .				
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a . . . . .		0		
10 Analysis of line 9:				
a Excess from 2010 . . . . .				
b Excess from 2011 . . . . .				
c Excess from 2012 . . . . .				
d Excess from 2013 . . . . .				
e Excess from 2014 . . . . .				

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

NOT APPLICABLE

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2014, enter the date of the ruling
b Check box to indicate whether the foundation is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed
b 85% of line 2a
c Qualifying distributions from Part XII, line 4 for each year listed
d Amounts included in line 2c not used directly for active conduct of exempt activities
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c
3 Complete 3a, b, or c for the alternative test relied upon
a "Assets" alternative test - enter
(1) Value of all assets
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)
b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed
c "Support" alternative test - enter
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)
(3) Largest amount of support from an exempt organization
(4) Gross investment income

Part 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).)
N/A
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.
N/A
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:
ATCH 12
b The form in which applications should be submitted and information and materials they should include:
LETTER FORM
c Any submission deadlines:
NONE
d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:
NONE

**Part XV** . Supplementary Information (continued)

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

Recipient 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
<b>a Paid during the year</b>				
ATCH 13				
<b>Total</b> . . . . . ▶ <b>3a</b>				170,000.
<b>b Approved for future payment</b>				
<b>Total</b> . . . . . ▶ <b>3b</b>				





**FORM 990-PF - PART IV**  
**CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME**

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj. basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
28,060.		500 SHS AGILENT TECHNOLOGIES INC 28,292.					02/21/2014 -232.	07/30/2014
50,000.		\$50,000 FHLMC @ 1.25% 49,957.					02/18/2014 43.	11/28/2014
40,000.		\$40,000 FNMA 40,025.					10/30/2013 -25.	05/14/2014
19,177.		1,000 SHS HATTERAS FINANCIAL CORP 18,729.					09/16/2013 448.	07/31/2014
14,144.		500 SHS N C R CROP NEW 16,172.					07/30/2014 -2,028.	11/05/2014
4,124.		125 SHS NOW INC 3,706.					01/28/2014 418.	07/30/2014
3.		.1428 SHS SYNOVUS FINANCIAL CP NEW 3.					09/26/2013	05/20/2014
36,809.		500 SHS TUPPERWARE BANDS CORP 38,863.					02/21/2014 -2,054.	09/12/2014
79,970.		\$75,000 VODAFONE GRP PLC @ 5% 82,623.					04/19/2013 -2,653.	03/26/2014
69,914.		2,000 SHS AT&T INC NEW 57,669.					12/14/2011 12,245.	10/22/2014
73,249.		900 SHS ACCENTURE PLC CL A 34,232.					11/03/2009 39,017.	08/26/2014
100,000.		\$100,000 ARDEN REALTY @ 5.25% 108,115.					03/06/2013 -8,115.	12/15/2014

**FORM 990-PF - PART IV  
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME**

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/allowable	Cost or other basis	FMV as of 12/31/69	Adj. basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
12,621.		100 SHS BERKSHIRE HATHAWAY B NEWCLASS B 6,636.					11/03/2009 5,985.	05/19/2014
1,113.		200 SHS CALIFORNIA RES CORP 1,658.					11/18/2011 -545.	12/10/2014
100,000.		\$100,000 FED HOME LN BKS @ 1.25% 99,725.					12/20/2013 275.	12/26/2014
25,474.		1,000 SHS GENERAL ELECTRIC CO 16,668.					12/14/2011 8,806.	01/28/2014
72,871.		3,800 SHS HATTERAS FINANCIAL CORP 95,167.					VARIOUS -22,296.	07312014
25,278.		450 SHS MERCK & CO INC NEW 17,636.					01132010 7,642.	VARIOUS
38,303.		1,000 SHS ORACLE CORPORATIONS 33,246.					02/01/2001 5,057.	12/01/2004
61,490.		3,750 SHS QR ENERGY LP 71,226.					VARIOUS -9,736.	10232014
56,942.		1,000 SHS QUINTILES TRANSNATIONAL 45,432.					08/06/2013 11,510.	11/05/2014
12,739.		500 SHS SCHW EMG MKT EQ ETF 13,204.					03/14/2012 -465.	05/19/2014
100,000.		\$100,000 SIMON PPTY GRP LP 105,805.					03/13/2013 -5,805.	11/01/2014
68,197.		1,700 SHS UNILEVER PLC ADR NEW FSPONSORE 54,959.					11/18/2011 13,238.	01/28/2014

**FORM 990-PF - PART IV**  
**CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME**

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/allowable	Cost or other basis	FMV as of 12/31/69	Adj. basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
41,760.		4,000 SHS WABASH NATIONAL CORP 47,244.				09/26/2013 -5,484.	11/05/2014	
27,608.		450 SHS WALGREEN COMPANY 16,249.				10/11/2012 11,359.	VARIOUS	
35,463.		600 SHS APACHE CORP 55,618.				12/08/2009 -20,155.	12/17/2014	
6.		THRU CARLYLE				6.		
3,012.		THRU CARLYLE				3,012.		
320.		THRU BEP				320.		
10,297.		\$10,000 VERIZON COMMS @2.6% 10,354.				06/02/2014 -57.	11/24/2014	
TOTAL GAIN (LOSS) .....						<u>39,731.</u>		

ATTACHMENT 1

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>
SCHWAB #9197-9594- DIVIDENDS	53,311.	53,311.
SCHWAB #9197-9594- INTEREST	41,354.	41,354.
LESS INTEREST PURCHASED	-1,082.	-1,082.
CARLYLE GROUP L.P.-DIVIDENDS	195.	195.
CARLYLE GROUP L.P.-INTEREST	443.	443.
BEP PRIVATE INVESTORS, L.P.- INTEREST	41.	41.
TOTAL	<u>94,262.</u>	<u>94,262.</u>

ATTACHMENT 2

FORM 990PF, PART I - OTHER INCOME

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>
BEP PRIVATE INVESTORS - ROYALTIES (NET)	6,859.	6,859.
QR ENERGY LP - ORDINARY INCOME (NET)	1,719.	1,719.
BEP PRIVATE INVESTORS LP - LOSS	-16,363.	-16,363.
CARLYLE GROUP LP -LOSS	-217.	-217.
<b>TOTALS</b>	<u>-8,002.</u>	<u>-8,002.</u>

ATTACHMENT 3

FORM 990PF, PART I - LEGAL FEES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>	<u>ADJUSTED NET INCOME</u>	<u>CHARITABLE PURPOSES</u>
LEGAL FEES	22,929.	22,929.		
TOTALS	<u>22,929.</u>	<u>22,929.</u>		

ATTACHMENT 4

FORM 990PF, PART I - OTHER PROFESSIONAL FEES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>
INVESTMENT ADVISOR FEES	22,175.	22,175.
TOTALS	<u>22,175.</u>	<u>22,175.</u>

FORM 990PF, PART II - U.S. AND STATE OBLIGATIONS

ATTACHMENT 5

<u>DESCRIPTION</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
VARIOUS	164,690.	164,666.
US OBLIGATIONS TOTAL	<u>164,690.</u>	<u>164,666.</u>

ATTACHMENT 6

FORM 990PF, PART II - CORPORATE STOCK

<u>DESCRIPTION</u>	<u>BEGINNING BOOK VALUE</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
VARIOUS	2,021,047.	1,450,898.	2,075,160.
TOTALS	<u>2,021,047.</u>	<u>1,450,898.</u>	<u>2,075,160.</u>

ATTACHMENT 7

FORM 990PF, PART II - CORPORATE BONDS

<u>DESCRIPTION</u>	<u>BEGINNING BOOK VALUE</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
VARIOUS	1,027,993.	695,991.	698,499.
TOTALS	<u>1,027,993.</u>	<u>695,991.</u>	<u>698,499.</u>

ATTACHMENT 8

FORM 990PF, PART II - OTHER INVESTMENTS

<u>DESCRIPTION</u>	<u>BEGINNING BOOK VALUE</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
BEP PRIVATE INVESTORS LP	59,441.	153,558.	235,916.
TOTALS	<u>59,441.</u>	<u>153,558.</u>	<u>235,916.</u>

ATTACHMENT 9

FORM 990PF, PART II - OTHER ASSETS

<u>DESCRIPTION</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
MISCELLANEOUS	315,891.	362,564.
TOTALS	<u>315,891.</u>	<u>362,564.</u>

ATTACHMENT 10FORM 990PF, PART III - OTHER INCREASES IN NET WORTH OR FUND BALANCES

<u>DESCRIPTION</u>	<u>AMOUNT</u>
ADJUST FOR BALANCE SHEET ITEMS	1,180.
TOTAL	<u>1,180.</u>

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

ATTACHMENT 11

TITLE AND AVERAGE HOURS PER  
WEEK DEVOTED TO POSITION

NAME AND ADDRESS

SMITH WINBORNE SELF  
300 PLYMOUTH AVENUE  
WINSTON-SALEM, NC 27104

DIRECTOR, VICE PRESIDENT

ROBERT L. EDWARDS  
417 AVALON ROAD  
WINSTON-SALEM, NC 27104

SECRETARY, TREASURER, DIRECTOR

ROBERT SHELDON  
1605 BEACHTREE ROAD  
GREENSBORO, NC 27408

DIRECTOR

FORM 990PF, PART XV - NAME, ADDRESS AND PHONE FOR APPLICATIONS

ROBERT L. EDWARDS  
1001 WEST FOURTH STREET  
WINSTON-SALEM, NC 27101  
336-607-7314

THE SARA SMITH SELF FOUNDATION  
YEAR-END MARKET VALUE  
AS OF 12/31/2014

SAVINGS & TEMPORARY CASH INVESTMENTS:

CASH	309.70	
SCHWAB US TREAS MONEY FD	335,036.88	335,346.58

PRIVATE EQUITY:

BEP PRIVATE INVESTORS LP		235,917.66
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CORPORATE BONDS AND NOTES:

100,000 AT&T INC @ 5.5% DUE 2/1/18	110,459.40	
100,000 DUKE ENERGY @ 5.25% DUE 12/15/15	104,415.80	
100,000 FED HOME LN BKS @1% DUE 2/20/15	99,975.00	
65,000 FNMA @ .7% DUE 6/4/2018	64,690.73	
100,000 GOLDMAN SACHS GRP @ 4.8% DUE 11/15/19	108,393.60	
100,000 INTERNATIONAL C @ 2.125% DUE 9/15/15	101,040.40	
50,000 JP MORGAN CHASE FLT DUE 09/21/16	49,999.05	
40,000 MORGAN STANLEY @ 5% DUE 10/15/30	40,903.20	
75,000 PRUDENTIAL FINL @3% DUE 5/12/16	76,983.45	
80,000 TEVA PHARMA FLT DUE6/15/15	80,762.80	
25,000 VERIZON COMMS @ 2.5% DUE 09/15/16	25,541.40	863,164.83

EQUITIES:

1,100 ABBVIE INC	71,984.00	
1,050 APPLE INC	115,899.00	
1,850 BB&T	71,946.50	
700 BERKSHIRE HATHAWAY CL B	105,105.00	
1,000 BHP BILLITON LTD ADR	47,320.00	
1,600 BRISTOL-MYERS SQUIBB	94,448.00	
1,500 CARLYLE GROUP	41,250.00	
1,000 CONOCOPHILLIPS	69,060.00	
2,500 EMC CORP	74,350.00	
2,500 GENERAL ELECTRIC CO	63,175.00	
50 GOOGLE- CLASS C	26,320.00	
50 GOOGLE- CLASS A	26,533.00	
1,750 GNC HOLDINGS	82,180.00	
700 HONEYWELL INTERNATIONAL	69,944.00	
4,000 KB HOME	66,200.00	
1,500 LOWES COMPANIES INC	103,200.00	
1,300 MERCK	73,827.00	

THE SARA SMITH SELF FOUNDATION  
YEAR-END MARKET VALUE  
AS OF 12/31/2014

2,250 MONDELEZ INTL INC CL A	81,731.25	
500 NATIONAL OILWELL VARCO	32,765.00	
500 OCCIDENTAL PETE CORP	40,305.00	
1,000 ORACLE CORPORATION	44,970.00	
900 PEPSICO INCORPORATED	85,104.00	
700 PHILIP MORRIS INTL INC	57,015.00	
500 PHILLIPS 66	35,850.00	
1,750 POWERSHARES ETF FD TR II	81,703.83	
1,000 QUALCOMM INC	74,330.00	
3,000 SCH US MID-CAP ETF	122,040.00	
2,500 SCHW EMG MKT EQ ETF	59,750.00	
2,000 SCHW INTL EQ ETF	57,820.00	
850 STARBUCKS CORP	69,742.50	
2,857 SYNOVUS FINANCIAL CORP	77,396.13	
1,000 T J X COS INC	68,580.00	
800 UNITED TECHNOLOGIES CORP	92,000.00	
1,300 WALGREENS BOOTS	99,060.00	
1,000 WELLS FARGO & CO NEW	54,820.00	2,437,724.21

TOTAL MARKET VALUE AS OF 12/31/2014

3,872,153.28

THE SARA SMITH SELF FOUNDATION  
YEAR-END BOOK VALUE  
AS OF 12/31/2014

SAVINGS & TEMPORARY CASH INVESTMENTS:

CASH	310.00	
SCHWAB US TREAS MONEY FD	335,038.00	335,348.00

PRIVATE EQUITY:

BEP PRIVATE INVESTORS LP		153,558.00
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CORPORATE BONDS AND NOTES:

100,000 AT&T INC @ 5.5% DUE 2/1/18	106,025.00	
100,000 DUKE ENERGY @ 5.25% DUE 12/15/15	111,285.00	
100,000 INTERNATIONAL C @ 2.125% DUE 9/15/15	102,444.00	
100,000 FED HOME LN BKS @1% DUE 2/20/15	99,990.00	
65,000 FNMA @ .7% DUE 6/4/2018	64,700.00	
100,000 GOLDMAN SACHS GRP @ 4.8% DUE 11/15/19	99,475.00	
50,000 JP MORGAN CHASE FLT DUE 09/21/16	49,525.00	
40,000 MORGAN STANLEY @ 5% DUE 10/15/30	39,625.00	
75,000 PRUDENTIAL FINL @3% DUE 5/12/16	78,403.75	
80,000 TEVA PHARMA FLT DUE6/15/15	83,321.00	
25,000 VERIZON COMMS @ 2.5% DUE 09/15/16	25,886.75	860,680.50

EQUITIES:

1,100 ABBVIE INC	30,261.70	
1,050 APPLE INC	30,036.60	
1,850 BB&T	56,657.99	
700 BERKSHIRE HATHAWAY CL B	46,448.68	
1,000 BHP BILLITON LTD ADR	67,453.75	
1,600 BRISTOL-MYERS SQUIBB	52,740.76	
1,500 CARLYLE GROUP	39,336.55	
1,000 CONOCOPHILLIPS	56,252.22	
2,500 EMC CORP	68,108.95	
2,500 GENERAL ELECTRIC CO	40,380.75	
50 GOOGLE- CLASS C	19,537.56	
50 GOOGLE- CLASS A	19,600.19	
1,750 GNC HOLDINGS	68,948.45	
700 HONEYWELL INTERNATIONAL	67,669.41	

THE SARA SMITH SELF FOUNDATION  
YEAR-END BOOK VALUE  
AS OF 12/31/2014

4,000 KB HOME	54,802.40	
1,500 LOWES COMPANIES INC	63,756.85	
1,300 MERCK	50,947.00	
2,250 MONDELEZ INTL INC CL A	68,152.78	
500 NATIONAL OILWELL VARCO	32,955.19	
500 OCCIDENTAL PETE CORP	45,930.33	
1,000 ORACLE CORPORATION	32,185.55	
900 PEPSICO INCORPORATED	55,421.10	
700 PHILIP MORRIS INTL INC	33,774.30	
500 PHILLIPS 66	16,717.32	
1,750 POWERSHARES ETF FD TR II	64,792.20	
1,000 QUALCOMM INC	45,010.00	
3,000 SCH US MID-CAP ETF	96,236.80	
2,500 SCHW EMG MKT EQ ETF	60,069.00	
2,000 SCHW INTL EQ ETF	55,456.20	
850 STARBUCKS CORP	62,826.59	
2,857 SYNOVUS FINANCIAL CORP	65,795.66	
1,000 T J X COS INC	59,781.75	
800 UNITED TECHNOLOGIES CORP	54,757.60	
1,300 WALGREENS BOOTS	46,170.00	
1,000 WELLS FARGO & CO NEW	37,816.25	1,766,788.43
TOTAL BOOK VALUE AS OF 12/31/2014		3,116,374.93

**THE SARA SMITH SELF FOUNDATION  
BEGINNING & ENDING MARKET VALUES  
2014**

**CHARLES SCHWAB #9197-9594**

**CASH & MONEY MARKET:**

	<u>BEGINNING</u>	<u>ENDING</u>	<u>TOTALS</u>
JANUARY	80,826.36	92,749.55	173,575.91
FEBRUARY	92,749.55	43,574.50	136,324.05
MARCH	43,574.50	42,896.36	86,470.86
APRIL	42,896.36	44,900.37	87,796.73
MAY	44,900.37	127,563.77	172,464.14
JUNE	127,563.77	36,064.89	163,628.66
JULY	36,064.89	19,236.75	55,301.64
AUGUST	19,236.75	208,904.81	228,141.56
SEPTEMBER	208,904.81	127,779.89	336,684.70
OCTOBER	127,779.89	176,705.27	304,485.16
NOVEMBER	176,705.27	289,607.34	466,312.61
DECEMBER	289,607.34	335,346.58	624,953.92

**SECURITIES:**

	<u>BEGINNING</u>	<u>ENDING</u>	<u>TOTALS</u>
JANUARY	3,618,055.38	3,505,300.06	7,123,355.44
FEBRUARY	3,505,300.06	3,672,291.54	7,177,591.60
MARCH	3,672,291.54	3,672,246.64	7,344,538.18
APRIL	3,672,246.64	3,771,686.33	7,443,932.97
MAY	3,771,686.33	3,667,715.74	7,439,402.07
JUNE	3,667,715.74	3,821,654.17	7,489,369.91
JULY	3,821,654.17	3,754,150.85	7,575,805.02
AUGUST	3,754,150.85	3,649,190.48	7,403,341.33
SEPTEMBER	3,649,190.48	3,639,487.86	7,288,678.34
OCTOBER	3,639,487.86	3,608,107.33	7,247,595.19
NOVEMBER	3,608,107.33	3,555,373.26	7,163,480.59
DECEMBER	3,555,373.26	3,300,889.04	6,856,262.30

TOTAL CHARLES SCHWAB BEGINNING & ENDING MONTH VALUES

90,389,492.88

**DEUTSCHE BANK # 5XN-408664**

	<u>BEGINNING</u>	<u>ENDING</u>	<u>TOTALS</u>
JANUARY	131,556.23	170,324.31	301,880.54
FEBRUARY	170,324.31	170,324.31	340,648.62
MARCH	170,324.31	208,107.31	378,431.62
APRIL	208,107.31	208,107.31	416,214.62
MAY	208,107.31	193,808.31	401,915.62
JUNE	193,808.31	211,458.31	405,266.62
JULY	211,458.31	193,126.36	404,584.67
AUGUST	193,126.36	198,856.45	391,982.81
SEPTEMBER	198,856.45	204,193.53	403,049.98
OCTOBER	204,193.53	215,883.59	420,077.12
NOVEMBER	215,883.59	210,850.63	426,734.22
DECEMBER	210,850.63	235,917.66	446,768.29

TOTAL DEUTSCHE BANK BEGINNING & ENDING MONTH MARKET VALUES

4,737,554.73

TOTAL CHARLES SCHWAB & DEUTSCHE BEGINNING & ENDING MONTH MARKET VALUES

95,127,047.61

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 13

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR		PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
	AND	FOUNDATION STATUS OF RECIPIENT		
UNIVERSITY OF NC AT GREENSBORO SCHOOL OF EDUCATION P.O. BOX 26170 GREENSBORO, NC 27402	NONE		EDUCATION PURPOSES - FUNDING SCHOLARSHIPS	
CENTRAL NC CHAPTER OF THE NATIONAL MS SOCIETY 2211 WEST MEADOWVIEW ROAD, SUITE 30 GREENSBORO, NC 27407	NONE		RESEARCH INTO CAUSES AND CURE FOR MULTIPLE SCLEROSIS	2,500.
JUVENILE DIABETES RESEARCH FOUNDATION (JDRE) 312 NORTH EUGENE STREET, SUITE D GREENSBORO, NC 27401	NONE		RESEARCH TO FIND A CURE FOR DIABETES AND ITS COMPLICATIONS	10,000.
SUMMIT SCHOOL 2100 REYNOLDA ROAD WINSTON-SALEM, NC 27106	NONE		TECHNOLOGY PROJECT AT THE SCHOOL	20,000.
HABITAT FOR HUMANITY OF FORSYTH COUNTY 339 WITT STREET WINSTON-SALEM, NC 27103	NONE		REUSE RESTORE RENEW - CAMPAIGN FOR HABITAT FOR HUMANITY OF FORSYTH COUNTY	3,000.
SALEM ACADEMY & COLLEGE MAIN BOX NUMBER 22 601 SOUTH CHURCH STREET WINSTON-SALEM, NC 27101	NONE		COLLEGE ANNUAL FUND AND ACADEMY ANNUAL FUND	2,000.

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 13 (CONT'D)

RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR

AND

FOUNDATION STATUS OF RECIPIENT

RECIPIENT NAME AND ADDRESS

PURPOSE OF GRANT OR CONTRIBUTION

AMOUNT

<p>NONE</p> <p>SENIOR SERVICES, INC. 2895 SHOREPAIR DRIVE WINSTON-SALEM, NC 27105</p>	<p>NONE</p> <p>HELPING THE ELDERLY LIVE WITH DIGNITY</p>	<p>3,000.</p>
<p>NONE</p> <p>SAMARITAN MINISTRIES 1243 NORTH PATTERSON AVENUE WINSTON-SALEM, NC 27101</p>	<p>FOOD AND SHELTER PROGRAM</p>	<p>1,000.</p>
<p>NONE</p> <p>BETHESDA CENTER FOR HOMELESS 930 NORTH PATTERSON AVENUE WINSTON-SALEM, NC 27127</p>	<p>ASSISTANCE TO HOMELESS MEN AND WOMEN IN COMMUNITY TO REGAIN HOPE FOR A BETTER FUTURE</p>	<p>2,000.</p>
<p>NONE</p> <p>NORTH CAROLINA VETERINARY MEDICAL FOUNDATION, INC. 1060 WILLIAM MOORE DRIVE RALEIGH, NC 27607</p>	<p>ORTHOPEDIC RESEARCH FUND</p>	<p>5,000.</p>
<p>NONE</p> <p>SECU FAMILY HOUSE 1970 BALDWIN LANE WINSTON-SALEM, NC 27103</p>	<p>HOSPITAL HOSPITALITY HOUSE PROVIDING AFFORDABLE LODGING IN A CARING ENVIRONMENT FOR REFERRED ADULT PATIENTS AND/OR THEIR CAREGIVERS WHO TRAVEL TO WINSTON-SALEM FOR MEDICAL TREATMENT</p>	<p>10,000.</p>
<p>NONE</p> <p>SECOND HARVEST FOOD BANK OF NORTHWEST NC 3655 REED STREET WINSTON-SALEM, NC 27107</p>	<p>PROVIDE FOOD TO VARIOUS CHARITIES FOR NORTHWEST NORTH CAROLINA</p>	<p>6,000.</p>

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 13 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
THE RANDOLPH ARTS GUILD 123 SUNSET AVENUE ASHEBORO, NC 27204	NONE	PROVIDES AND CONNECTS CITIZENS OF RANDOLPH COUNTY, NORTH CAROLINA WITH ARTS OPPORTUNITIES	5,000.
CRISIS CONTROL MINISTRY 200 EAST 10TH STREET WINSTON-SALEM, NC 27101	NONE	PURCHASE MEDICATIONS IN THE LICENSED FREE PHARMACY	3,000.
FORSYTH HUMANE SOCIETY P.O. BOX 15605 WINSTON-SALEM, NC 27113	NONE	CARE FOR HOMELESS ANIMALS AND FACILITATE PET ADOPTIONS; PROMOTE RESPONSIBLE PET OWNERSHIP; PROVIDE VETERINARY ASSISTANCE TO THOSE DEMONSTRATING A FINANCIAL NEED	3,000.
THE HOSPICE FOUNDATION 101 HOSPICE LANE WINSTON-SALEM, NC 27103	NONE	TO SUPPORT CURRENT AND FUTURE NEEDS OF HOSPICE & PALLIATIVE CARECENTER	2,000.
THE BARNABAS NETWORK P.O. BOX 2666 GREENSBORO, NC 27402	NONE	BASIC HOME FURNISHINGS FOR FAMILIES AND INDIVIDUALS WHO ARE MOVING FROM HOMELESSNESS, RECOVERING FROM A MAJOR SETBACK, FLEEING DOMESTIC VIOLENCE OR LIVING WITH INCOMES THAT CANNOT COVER BASIC NEEDS	5,000.
THE SERGEI FOUNDATION P.O. BOX 17256 WINSTON-SALEM, NC 27116	NONE	VET SUBSIDIES TO CARRY OUT MISSION OF SAVING PETS' LIVES IN NEED OF EMERGENCY OR LIFE-THREATENING CARE	

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 13 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND		PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
	FOUNDATION STATUS OF RECIPIENT			
AARF ADOPTON GROUP 311 HARVEY STREET WINSTON-SALEM, NC 27103	NONE		ANIMAL ADOPTION AND RESCUE	3,000.
WAKE FOREST UNIVERSITY BAPTIST MEDICAL CENTER MEDICAL CENTER BOULEVARD WINSTON-SALEM, NC 27157	NONE		FOR THE CC SMITH STROKE FUND FOR STROKE RESEARCH	20,000.
WAKE FOREST UNIVERSITY BAPTIST MEDICAL CENTER MEDICAL CENTER BOULEVARD WINSTON-SALEM, NC 7157	NONE		OPHTHALMOLOGY RESEARCH AND DEVELOPMENT	5,000.
WAKE FOREST UNIVERSITY BAPTIST MEDICAL CENTER MEDICAL CENTER BOULEVARD WINSTON-SALEM, NC 27157	NONE		DIABETIC RESEARCH	5,000.
WAKE FOREST UNIVERSITY BAPTIST MEDICAL CENTER MEDICAL CENTER BOULEVARD WINSTON-SALEM, NC 27157	NONE		CARDIOLOGY PROGRAM ACTIVITIES	5,000.
WAKE FOREST UNIVERSITY BAPTIST MEDICAL CENTER MEDICAL CENTER BOULEVARD WINSTON-SALEM, NC 27157	NONE		BREAST CANCER RESEARCH	5,000.

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 13 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
WAKE FOREST UNIVERSITY BAPTIST MEDICAL CENTER MEDICAL CENTER BOULEVARD WINSTON-SALEM, NC 27157	NONE	REGENERATIVE MEDICINE RESEARCH	5,000.
GLORY RIDGE CAMP FUND P.O. BOX 363 MARSHALL, NC 28753	NONE	CAMP AS A PLACE FOR HEALING AND REFLECTION TO SMALL GROUPS AND INDIVIDUALS	
NORTH CAROLINA MUSEUM OF HISTORY 5 EAST EDENTON STREET RALEIGH, NC 27601	NONE	MUSEUM (EXHIBITIONS AND EDUCATIONAL PROGRAMS)	2,000.
WINSTON-SALEM THEATRE ALLIANCE 1042 NORTHWEST BLVD WINSTON-SALEM, NC 27101	NONE	THEATRE FOR PLAYS AND MUSICALS	5,000.
IMUS RANCH FOR KIDS WITH CANCER P.O BOX 282 HOLTSVILLE, NY 11742	NONE	CAMP FOR CHILDREN WHO ARE AFFECTED BY CANCER, BLOOD DISORDERS AND SUDDEN INFANT DEATH SYSDROME	5,000.
STOKES COUNTY ARTS COUNCIL 500 NORTH MAIN STREET DANBURY, NC 27016	NONE	ART IN EDUCATION- SUPPORTING AND PROMOTING VISUAL AND PERFORMING ARTS IN RURAL STOKES COUNTY, NC	2,500.

FORM 990FF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 13 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
DOWNTOWN HEALTH PLAZA/WINSTON EAST PEDIATRICS 1200 NORTH MARTIN LUTHER KING, JR. DRIVE WINSTON-SALEM, NC 27101	NONE	PROVIDING HEALTH SERVICES TO CHILDREN	
FIRST TEE OF THE TRIAD P. O. BOX 236 CLEMMONS, NC 27012	NONE	SUPPORT OF THE SELF COMPUTER LAB LOCATED IN THE JOHN FAIDLEY LEARNING CENTER	25,000.
TOTAL CONTRIBUTIONS PAID			<u>170,000.</u>

**SCHEDULE D  
(Form 1041)**

Department of the Treasury  
Internal Revenue Service

**Capital Gains and Losses**

▶ Attach to Form 1041, Form 5227, or Form 990-T.  
▶ Use Form 8949 to list your transactions for lines 1b, 2, 3, 8b, 9 and 10.  
▶ Information about Schedule D and its separate instructions is at [www.irs.gov/form1041](http://www.irs.gov/form1041).

OMB No 1545-0092

**2014**

Name of estate or trust **THE SARA SMITH SELF FOUNDATION, INC.** Employer identification number **20-3631059**

Note: Form 5227 filers need to complete *only* Parts I and II.

**Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less**

See instructions for how to figure the amounts to enter on the lines below.  
This form may be easier to complete if you round off cents to whole dollars.

	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part I, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
<b>1a</b> Totals for all short-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 1b.				
<b>1b</b> Totals for all transactions reported on Form(s) 8949 with <b>Box A</b> checked . . . . .	282,584.	288,724.		-6,140.
<b>2</b> Totals for all transactions reported on Form(s) 8949 with <b>Box B</b> checked . . . . .				
<b>3</b> Totals for all transactions reported on Form(s) 8949 with <b>Box C</b> checked . . . . .	6.			6.
<b>4</b> Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824 . . . . .				<b>4</b>
<b>5</b> Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts . . . . .				<b>5</b>
<b>6</b> Short-term capital loss carryover. Enter the amount, if any, from line 9 of the 2013 Capital Loss Carryover Worksheet . . . . .				<b>6</b> ( )
<b>7</b> Net short-term capital gain or (loss). Combine lines 1a through 6 in column (h). Enter here and on line 17, column (3) on the back . . . . . ▶				<b>7</b> -6,134.

**Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year**

See instructions for how to figure the amounts to enter on the lines below.  
This form may be easier to complete if you round off cents to whole dollars.

	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part II, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
<b>8a</b> Totals for all long-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 8b.				
<b>8b</b> Totals for all transactions reported on Form(s) 8949 with <b>Box D</b> checked . . . . .	923,342.	880,489.		42,853.
<b>9</b> Totals for all transactions reported on Form(s) 8949 with <b>Box E</b> checked . . . . .				
<b>10</b> Totals for all transactions reported on Form(s) 8949 with <b>Box F</b> checked . . . . .	3,012.			3,012.
<b>11</b> Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824 . . . . .				<b>11</b>
<b>12</b> Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts. . . . .				<b>12</b>
<b>13</b> Capital gain distributions. . . . .				<b>13</b>
<b>14</b> Gain from Form 4797, Part I. . . . .				<b>14</b>
<b>15</b> Long-term capital loss carryover. Enter the amount, if any, from line 14 of the 2013 Capital Loss Carryover Worksheet . . . . .				<b>15</b> ( )
<b>16</b> Net long-term capital gain or (loss). Combine lines 8a through 15 in column (h). Enter here and on line 18a, column (3) on the back . . . . . ▶				<b>16</b> 45,865.

For Paperwork Reduction Act Notice, see the Instructions for Form 1041.

Schedule D (Form 1041) 2014

JSA  
4F1210 1 000

<b>Part III Summary of Parts I and II</b> <i>Caution: Read the instructions before completing this part.</i>		(1) Beneficiaries' (see instr)	(2) Estate's or trust's	(3) Total
17	Net short-term gain or (loss)	17		-6,134.
18	Net long-term gain or (loss):			
a	Total for year	18a		45,865.
b	Unrecaptured section 1250 gain (see line 18 of the wrksht.)	18b		
c	28% rate gain	18c		
19	Total net gain or (loss). Combine lines 17 and 18a.	19		39,731.

**Note:** If line 19, column (3), is a net gain, enter the gain on Form 1041, line 4 (or Form 990-T, Part I, line 4a). If lines 18a and 19, column (2), are net gains, go to Part V, and do not complete Part IV. If line 19, column (3), is a net loss, complete Part IV and the **Capital Loss Carryover Worksheet**, as necessary.

**Part IV Capital Loss Limitation**

20	Enter here and enter as a (loss) on Form 1041, line 4 (or Form 990-T, Part I, line 4c, if a trust), the smaller of: a The loss on line 19, column (3) or b \$3,000	20	( )
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**Note:** If the loss on line 19, column (3), is more than \$3,000, or if Form 1041, page 1, line 22 (or Form 990-T, line 34), is a loss, complete the **Capital Loss Carryover Worksheet** in the instructions to figure your capital loss carryover.

**Part V Tax Computation Using Maximum Capital Gains Rates**

**Form 1041 filers.** Complete this part only if both lines 18a and 19 in column (2) are gains, or an amount is entered in Part I or Part II and there is an entry on Form 1041, line 2b(2), and Form 1041, line 22, is more than zero.

**Caution:** Skip this part and complete the **Schedule D Tax Worksheet** in the instructions if:

- Either line 18b, col. (2) or line 18c, col. (2) is more than zero, or
- Both Form 1041, line 2b(1), and Form 4952, line 4g are more than zero.

**Form 990-T trusts.** Complete this part only if both lines 18a and 19 are gains, or qualified dividends are included in income in Part I of Form 990-T, and Form 990-T, line 34, is more than zero. Skip this part and complete the **Schedule D Tax Worksheet** in the instructions if either line 18b, col. (2) or line 18c, col. (2) is more than zero

21	Enter taxable income from Form 1041, line 22 (or Form 990-T, line 34).	21	
22	Enter the smaller of line 18a or 19 in column (2) but not less than zero.	22	
23	Enter the estate's or trust's qualified dividends from Form 1041, line 2b(2) (or enter the qualified dividends included in income in Part I of Form 990-T).	23	
24	Add lines 22 and 23	24	
25	If the estate or trust is filing Form 4952, enter the amount from line 4g; otherwise, enter -0-	25	
26	Subtract line 25 from line 24. If zero or less, enter -0-	26	
27	Subtract line 26 from line 21. If zero or less, enter -0-	27	
28	Enter the smaller of the amount on line 21 or \$2,500	28	
29	Enter the smaller of the amount on line 27 or line 28	29	
30	Subtract line 29 from line 28. If zero or less, enter -0-. This amount is taxed at 0%	30	
31	Enter the smaller of line 21 or line 26	31	
32	Subtract line 30 from line 26	32	
33	Enter the smaller of line 21 or \$12,150	33	
34	Add lines 27 and 30	34	
35	Subtract line 34 from line 33. If zero or less, enter -0-	35	
36	Enter the smaller of line 32 or line 35	36	
37	Multiply line 36 by 15%	37	
38	Enter the amount from line 31	38	
39	Add lines 30 and 36	39	
40	Subtract line 39 from line 38. If zero or less, enter -0-	40	
41	Multiply line 40 by 20%	41	
42	Figure the tax on the amount on line 27. Use the 2014 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041).	42	
43	Add lines 37, 41, and 42	43	
44	Figure the tax on the amount on line 21. Use the 2014 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041).	44	
45	Tax on all taxable income. Enter the smaller of line 43 or line 44 here and on Form 1041, Schedule G, line 1a (or Form 990-T, line 36)	45	





Name(s) shown on return Name and SSN or taxpayer identification no not required if shown on other side  
**THE SARÀ SMITH SELF FOUNDATION, INC.**

Social security number or taxpayer identification number  
**20-3631059**

Before you check Box D, E, or F below, see whether you received any Form(s) 1099-B or substitute statement(s) from your broker. A substitute statement will have the same information as Form 1099-B. Either may show your basis (usually your cost) even if your broker did not report it to the IRS. Brokers must report basis to the IRS for most stock you bought in 2011 or later (and for certain debt instruments you bought in 2014 or later)

**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 (Example 100 sh XYZ Co)	(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 Column (e) 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	
	2,000 SHS AT&T INC NEW	12/14/2011	10/22/2014	69,914.	57,669.			12,245.
	900 SHS ACCENTURE PLC CL A	11/03/2009	08/26/2014	73,249.	34,232.			39,017.
	\$100,000 ARDEN REALTY 5.25%	03/06/2013	12/15/2014	100,000.	108,115.			-8,115.
	100 SHS BERKSHIRE HATHAWAY B NEWCLASS	11/03/2009	05/19/2014	12,621.	6,636.			5,985.
	200 SHS CALIFORNIA RES CORP	11/18/2011	12/10/2014	1,113.	1,658.			-545.
	\$100,000 FED HOME LN BKS @ 1.25%	12/20/2013	12/26/2014	100,000.	99,725.			275.
	1,000 SHS GENERAL ELECTRIC CO	12/14/2011	01/28/2014	25,474.	16,668.			8,806.
	3,800 SHS HATTERAS FINANCIAL CORP	VARIOUS	07312014	72,871.	95,167.			-22,296.
	450 SHS MERCK & CO INC NEW	01132010	VARIOUS	25,278.	17,636.			7,642.
	1,000 SHS ORACLE CORPORATIONS	02/01/2001	12/01/2004	38,303.	33,246.			5,057.
	3,750 SHS QR ENERGY LP	VARIOUS	10232014	61,490.	71,226.			-9,736.
	1,000 SHS QUINTILES TRANSNATIONAL	08/06/2013	11/05/2014	56,942.	45,432.			11,510.
	500 SHS SCHW EMG MKT E ETF	03/14/2012	05/19/2014	12,739.	13,204.			-465.
	\$100,000 SIMON PPTY GR LP	03/13/2013	11/01/2014	100,000.	105,805.			-5,805.
<b>2 Totals.</b> 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) ▶				923,342	880,489.			42,853.

**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.





# Application for Extension of Time To File an Exempt Organization Return

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](http://www.irs.gov/form8868).

- If you are filing for an **Automatic 3-Month Extension**, complete only Part I and check this box  **X**
  - If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only Part II (on page 2 of this form).
- Do not complete Part II unless** you have already been granted an automatic 3-month extension on a previously filed Form 8868.

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

<b>Type or print</b>	Name of exempt organization or other filer, see instructions.  THE SARA SMITH SELF FOUNDATION, INC.	Employer identification number (EIN) or  20-3631059
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. 1001 WEST FOURTH STREET	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions WINSTON-SALEM, NC 27101	

Enter the Return code for the return that this application is for (file a separate application for each return) 0 4

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

- The books are in the care of ▶ ROBERT L. EDWARDS, 1001 WEST FOURTH STREET WINSTON-SALEM, NC 27101

Telephone No. ▶ 336 607-7314 FAX No ▶ 336 734-2641

- 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 08/15, 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 \_\_\_\_\_, 20\_\_\_\_, and ending \_\_\_\_\_, 20\_\_\_\_.

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 Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	<b>3a</b>	\$ 4,631.
b If this application is for Form 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.	<b>3b</b>	\$ 2,131.
c <b>Balance due.</b> Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	<b>3c</b>	\$ 2,500.

**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.

For Privacy Act and Paperwork Reduction Act Notice, see instructions.