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Form 990-PF

Return of Private Foundation

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

2014

Open to Public Inspection

Department of the Treasury Internal Revenue Service

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

Name of foundation LUMOS, A Employer identification number 20-8203226, B Telephone number (615) 783-0101, G Check all that apply, H Check type of organization, I Fair market value of all assets at end of year \$ 3,685,742, J Accounting method Accrual, F If the foundation is in a 60-month termination...

Table with 5 columns: (a) Revenue and expenses per books, (b) Net investment income, (c) Adjusted net income, (d) Disbursements for charitable purposes. Rows include Revenue (1-12) and Operating and Administrative Expenses (13-26), with a total of 216,845 and net income of 182,177.

Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)

Part II Balance Sheets		Beginning of year			End of year		
		(a) Book Value	(b) Book Value	(c) Fair Market Value	(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing					
	2	Savings and temporary cash investments	629,975	320,065	320,065		
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____					
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____					
	5	Grants receivable					
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)					
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____					
	8	Inventories for sale or use					
	9	Prepaid expenses and deferred charges					
	10a	Investments—U S and state government obligations (attach schedule)					
	b	Investments—corporate stock (attach schedule)	2,537,207 <input type="checkbox"/>	3,107,489	3,107,489		
	c	Investments—corporate bonds (attach schedule)	279,082 <input type="checkbox"/>	187,232	187,232		
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____					
	12	Investments—mortgage loans					
	13	Investments—other (attach schedule)	101,844 <input type="checkbox"/>	70,956	70,956		
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____					
15	Other assets (describe ▶ _____)	<input type="checkbox"/> 591	<input type="checkbox"/> 0	<input type="checkbox"/> 0			
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	3,548,699	3,685,742	3,685,742			
Liabilities	17	Accounts payable and accrued expenses	3,825	3,920			
	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 ▶ _____)	<input type="checkbox"/> 6,103	<input type="checkbox"/> 8,990			
23	Total liabilities (add lines 17 through 22)	9,928	12,910				
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.						
	24	Unrestricted	3,538,771	3,672,832			
	25	Temporarily restricted					
	26	Permanently restricted					
	Foundations that do not follow SFAS 117, check here <input type="checkbox"/> and complete lines 27 through 31.						
	27	Capital stock, trust principal, or current funds					
	28	Paid-in or capital surplus, or land, bldg, and equipment fund					
29	Retained earnings, accumulated income, endowment, or other funds						
30	Total net assets or fund balances (see instructions)	3,538,771	3,672,832				
31	Total liabilities and net assets/fund balances (see instructions)	3,548,699	3,685,742				

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	3,538,771
2	Enter amount from Part I, line 27a	2	7,374
3	Other increases not included in line 2 (itemize) ▶ _____ <input type="checkbox"/>	3	126,687
4	Add lines 1, 2, and 3	4	3,672,832
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	3,672,832

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo, day, yr)	(d) Date sold (mo, day, yr)
1 a PUBLICLY-TRADED SECURITIES	P		
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 1,150,592		1,058,105	92,487
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) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a			92,487
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	92,487
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8		3	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? Yes No
 If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2013	156,053	3,389,675	0.046038
2012	153,423	3,124,307	0.049106
2011	143,821	3,089,623	0.046550
2010	108,044	2,947,944	0.036651
2009	146,780	2,377,977	0.061725

2 Total of line 1, column (d).	2	0.240070
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0.048014
4 Enter the net value of noncharitable-use assets for 2014 from Part X, line 5.	4	3,583,223
5 Multiply line 4 by line 3.	5	172,045
6 Enter 1% of net investment income (1% of Part I, line 27b).	6	1,822
7 Add lines 5 and 6.	7	173,867
8 Enter qualifying distributions from Part XII, line 4.	8	168,554

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

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b	1	3,644
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	3,644
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	3,644
6	Credits/Payments		
a	2014 estimated tax payments and 2013 overpayment credited to 2014	6a	3,291
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments Add lines 6a through 6d.	7	3,291
8	Enter any penalty for underpayment of estimated tax Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	353
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	
11	Enter the amount of line 10 to be Credited to 2015 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	11	

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

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ <u>HTTP //BLOGS BELMONT EDU/LUMOS/</u>	13	Yes	
14	The books are in care of ▶ <u>CYNTHIA LEU</u> Telephone no ▶ <u>(615) 783-0101</u> Located at ▶ <u>3502 SCARDSALE RD NASHVILLE TN</u> ZIP+4 ▶ <u>37215</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year ▶	15		
16	At any time during calendar year 2014, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes", enter the name of the foreign country ▶	16	Yes	No

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
1b	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)? <input type="checkbox"/> Organizations relying on a current notice regarding disaster assistance check here. ▶ <input type="checkbox"/>	1b		No
1c	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? <input type="checkbox"/>	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ▶ 20___, 20___, 20___, 20___			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions). <input type="checkbox"/>	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20___, 20___, 20___, 20___			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If "Yes," did it have excess business holdings in 2014 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2014.</i>) <input type="checkbox"/>	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2014?	4b		No

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

<p>5a During the year did the foundation pay or incur any amount to</p> <p>(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(3) Provide a grant to an individual for travel, study, or other similar purposes? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No Organizations relying on a current notice regarding disaster assistance check here. <input type="checkbox"/></p> <p>c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," attach the statement required by Regulations section 53.4945–5(d).</p> <p>6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes" to 6b, file Form 8870.</p> <p>7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p>	5b		
	6b		No
	7b		

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
CYNTHIA LEU 3502 SCARDSALE RD NASHVILLE, TN 37215	PRESIDENT 30 00	77,250	12,478	0
AMY STRAUS JOSEFEK 115 CAMINO DE LAS COLINAS REDONDO BEACH, CA 90277	DIRECTOR 0 25	0	0	0
DEBBIE BANKS SKELLENGER 88 BEACHDALE DRIVE AVON LAKE, OH 44012	DIRECTOR 0 25	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. 0

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.	▶	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	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See instructions	
3	
Total. Add lines 1 through 3	▶

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	3,065,562
b	Average of monthly cash balances.	1b	572,228
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	3,637,790
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	3,637,790
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	54,567
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	3,583,223
6	Minimum investment return. Enter 5% of line 5.	6	179,161

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	179,161
2a	Tax on investment income for 2014 from Part VI, line 5.	2a	3,644
b	Income tax for 2014 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	3,644
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	175,517
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	175,517
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	175,517

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	168,554
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	168,554
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	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	168,554

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				175,517
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only.			90,997	
b Total for prior years 20___, 20___, 20___		0		
3 Excess distributions carryover, if any, to 2014				
a From 2009.				
b From 2010.				
c From 2011.				
d From 2012.				
e From 2013.				
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2014 from Part XII, line 4 ▶ \$ <u>168,554</u>				
a Applied to 2013, but not more than line 2a			90,997	
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.				77,557
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2014 <i>(If an amount appears in column (d), the same amount must be shown in column (a).)</i>	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0			
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 instructions			0	
f Undistributed income for 2014 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015				97,960
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 (see instructions).	0			
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)

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2014, enter the date of the ruling. _____

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

	Tax year	Prior 3 years			(e) Total
	(a) 2014	(b) 2013	(c) 2012	(d) 2011	
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 organization had \$5,000 or more in assets at any time during the year—see instructions.)

1 Information Regarding Foundation Managers:

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

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

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

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

a The name, address, and telephone number or email address of the person to whom applications should be addressed

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

c Any submission deadlines

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

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 <i>Paid during the year</i> BELMONT UNIVERSITY 1900 BELMONT BLVD NASHVILLE, TN 37212	N/A	501(C)(3)	ENDOWMENT FOR LUMOS TRAVEL SCHOLARSHIPS	90,997
Total				90,997
b <i>Approved for future payment</i>				
Total				0

TY 2014 Accounting Fees Schedule

Name: LUMOS

EIN: 20-8203226

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	3,972	0		3,972

**TY 2014 Investments Corporate
Bonds Schedule****Name:** LUMOS**EIN:** 20-8203226

Name of Bond	End of Year Book Value	End of Year Fair Market Value
BANK OF AMERICA CORP	84,152	84,152
LEHMAN BROS HLDG CP TR V	540	540
MERRILL LYNCH PFD CAP TR	51,060	51,060
PREFERRED PLUS TR SRS	51,480	51,480

TY 2014 Investments Corporate Stock Schedule

Name: LUMOS

EIN: 20-8203226

Name of Stock	End of Year Book Value	End of Year Fair Market Value
ADOBE SYS DEL PV\$ 0.001, 46 SHARES	3,344	3,344
AFFILIATED MANAGERS GRP, 7 SHARES	1,486	1,486
ALEXION PHARMS INC, 29 SHARES	5,366	5,366
ALLIANCE DATA SYS CORP, 6 SHARES	1,716	1,716
AMAZON COM INC COM, 9 SHARES	2,793	2,793
AMERISOURCEBERGEN CORP, 34 SHARES	3,065	3,065
AMPHENOL CORP CL A NEW, 38 SHARES	2,045	2,045
APPLE INC, 72 SHARES	7,947	7,947
ARM HLDGS PLC SPD ADR, 21 SHARES	972	972
ASML HLDG NV NY REG SHS, 38 SHARES	4,098	4,098
AVAGO TECHNOLOGIES LTD, 38 SHARES	3,822	3,822
BAIDU INC SPON ADR, 10 SHARES	2,280	2,280
BIOGEN IDEC INC, 15 SHARES	5,092	5,092
BLACKROCK INC, 5 SHARES	1,788	1,788
CABOT OIL & GAS CORP, 85 SHARES	2,517	2,517
CELGENE CORP COM, 68 SHARES	7,606	7,606
CHIPOTLE MEXICAN GRILL, 4 SHARES	2,738	2,738
COLGATE PALMOLIVE, 23 SHARES	1,591	1,591
COMCAST CORP NEW CL A, 99 SHARES	5,743	5,743
COSTCO WHOLESALE CRP DEL, 23 SHARES	3,260	3,260
CVS HEALTH CORP, 30 SHARES	2,889	2,889
DELPHI AUTOMOTIVE PLC, 34 SHARES	2,472	2,472
DELTA AIR LINES INC, 97 SHARES	4,771	4,771
ECOLAB INC, 18 SHARES	1,881	1,881
FACEBOOK INC, 129 SHARES	10,065	10,065
FLOWSERVE CORP, 29 SHARES	1,735	1,735
FMC TECHS INC COM, 11 SHARES	515	515
FORTUNE BRANDS HOME AND, 22 SHARES	996	996
GILEAD SCIENCES INC COM, 89 SHARES	8,389	8,389
GOOGLE INC CL A, 6 SHARES	3,184	3,184

Name of Stock	End of Year Book Value	End of Year Fair Market Value
GOOGLE INC SHS CL C, 11 SHARES	5,790	5,790
HOME DEPOT INC, 85 SHARES	8,922	8,922
HONEYWELL INTL INC DEL, 41 SHARES	4,097	4,097
ILLUMINA INC COM, 10 SHARES	1,846	1,846
KANSAS CITY SOUTHERN, 25 SHARES	3,051	3,051
KEURIG GREEN MOUNTN INC, 11 SHARES	1,456	1,456
LAS VEGAS SANDS CORP, 29 SHARES	1,687	1,687
LIBERTY GLOBAL PLC CL C, 47 SHARES	2,271	2,271
LINKEDIN CORP, 11 SHARES	2,527	2,527
LYONDELLBASELL INDUSTRIE, 34 SHARES	2,699	2,699
MARATHON PETROLEUM CORP, 12 SHARES	1,083	1,083
MASTERCARD INC, 101 SHARES	8,702	8,702
MCKESSON CORPORATION COM, 16 SHARES	3,321	3,321
MICHAEL KORS HLDGS LTD, 48 SHARES	3,605	3,605
MONSANTO CO NEW DEL COM, 5 SHARES	597	597
MOODY'S CORP, 33 SHARES	3,162	3,162
NETFLIX COM INC, 4 SHARES	1,366	1,366
PIONEER NATURAL RES CO, 13 SHARES	1,935	1,935
PPG INDUSTRIES INC SHS, 13 SHARES	3,005	3,005
REGENERON PHARMACTCLS, 13 SHARES	5,333	5,333
ROPER INDUSTRIES INC COM, 8 SHARES	1,251	1,251
SALESFORCE COM INC, 53 SHARES	3,143	3,143
SALIX PHRMCTCLS LTD COM, 5 SHARES	575	575
SHERWIN WILLIAMS, 20 SHARES	5,261	5,261
SPLUNK INC, 8 SHARES	472	472
STARBUCKS CORP, 41 SHARES	3,364	3,364
TD AMERITRADE HLDG CORP, 68 SHARES	2,433	2,433
TESLA MTRS INC, 14 SHARES	3,114	3,114
THE PRICELINE GROUP INC, 4 SHARES	4,561	4,561
TIME WARNER INC SHS, 26 SHARES	2,221	2,221

Name of Stock	End of Year Book Value	End of Year Fair Market Value
TWENTY-FIRST CENTURY, 98 SHARES	3,764	3,764
UNION PACIFIC CORP, 41 SHARES	4,884	4,884
VALEANT PHARMACEUTICALS, 31 SHARES	4,436	4,436
VERTEX PHARMCTLS INC, 36 SHARES	4,277	4,277
VISA INC CL A SHRS, 24 SHARES	6,293	6,293
ADVISORY RESEARCH MLP &, 9,512 SHARES	128,693	128,693
BANK OF AMERICA CORP, 2,000 SHARES	35,780	35,780
BLACKROCK GLOBAL, 6,654 SHARES	120,906	120,906
CITIGROUP INC COM NEW, 1,461 SHARES	79,055	79,055
DAVIS NY VENTURE, 517 SHARES	17,980	17,980
DELTA AIR LINES INC, 6,792 SHARES	334,098	334,098
EATON VANCE LARGE CAP, 9,578 SHARES	179,499	179,499
NATL HEALTH INVS INC, 3,620 SHARES	253,255	253,255
PIONEER HIGH YIELD, 16,121 SHARES	160,241	160,241
SP500 CLIRN ISSUER BAC, 13,700 SHARES	142,891	142,891
SP500 CLIRN ISSUER DB, 5,300 SHARES	54,230	54,230
SX5E ARN ISSUER SEK, 5,300 SHARES	52,645	52,645
ACE LIMITED, 26 SHARES	2,987	2,987
ACTIVISION BLIZZARD INC, 133 SHARES	2,680	2,680
AGILENT TECHNOLOGIES INC, 32 SHARES	1,310	1,310
AMAZON COM INC COM, 36 SHARES	11,173	11,173
AMER EXPRESS COMPANY, 159 SHARES	14,793	14,793
BANK NEW YORK MELLON, 426 SHARES	17,283	17,283
BERKSHIRE HATHAWAYINC, 83 SHARES	12,462	12,462
BROOKFIELD ASSET MGMT, 77 SHARES	3,860	3,860
CANADIAN NATURAL RES LTD, 143 SHARES	4,416	4,416
CARMAX INC, 90 SHARES	5,992	5,992
COSTCO WHOLESALE CRP DEL, 68 SHARES	9,639	9,639
DIAGEO PLC SPSD ADR NEW, 50 SHARES	5,705	5,705
ECOLAB INC, 39 SHARES	4,076	4,076

Name of Stock	End of Year Book Value	End of Year Fair Market Value
ENCANA CORP, 226 SHARES	3,135	3,135
EOG RESOURCES INC, 98 SHARES	9,023	9,023
EXPRESS SCRIPTS HLDG CO, 98 SHARES	8,298	8,298
GOOGLE INC CL A, 13 SHARES	6,899	6,899
GOOGLE INC SHS CL C, 13 SHARES	6,843	6,843
JPMORGAN CHASE & CO, 89 SHARES	5,570	5,570
KEYSIGHT TECHNOLOGIES, 16 SHARES	540	540
LABORATORY CP AMER HLDGS, 52 SHARES	5,611	5,611
LAS VEGAS SANDS CORP, 120 SHARES	6,979	6,979
LIBERTY GLOBAL PLC CL C, 162 SHARES	7,826	7,826
LIBERTY INTERACTIVE CORP, 83 SHARES	2,442	2,442
LIBERTY INTERACTIVE SRS, 11 SHARES	415	415
LOEWS CORP, 126 SHARES	5,295	5,295
MICROSOFT CORP, 88 SHARES	4,088	4,088
MOODY'S CORP, 21 SHARES	2,012	2,012
ORACLE CORP \$0.01 DEL, 82 SHARES	3,688	3,688
PACCAR INC, 46 SHARES	3,128	3,128
PRAXAIR INC, 44 SHARES	5,701	5,701
QUEST DIAGNOSTICS INC, 49 SHARES	3,286	3,286
SCHWAB CHARLES CORP NEW, 123 SHARES	3,713	3,713
SYSCO CORPORATION, 95 SHARES	3,771	3,771
TEXAS INSTRUMENTS, 106 SHARES	5,667	5,667
THE PRICELINE GROUP INC, 3 SHARES	3,421	3,421
ULTRA PETROLEUM CORP, 175 SHARES	2,303	2,303
UNITEDHEALTH GROUP INC, 100 SHARES	10,109	10,109
VALEANT PHARMACEUTICALS, 29 SHARES	4,150	4,150
VISA INC CL A SHRS, 14 SHARES	3,671	3,671
WELLS FARGO & CO NEW DEL, 303 SHARES	16,610	16,610
ABBVIE INC SHS, 200 SHARES	13,088	13,088
ALTRIA GROUP INC, 500 SHARES	24,635	24,635

Name of Stock	End of Year Book Value	End of Year Fair Market Value
AMER EXPRESS COMPANY, 250 SHARES	23,260	23,260
APPLE INC, 693 SHARES	76,493	76,493
CATERPILLAR INC DEL, 175 SHARES	16,018	16,018
CHIPOTLE MEXICAN GRILL, 200 SHARES	136,902	136,902
CIGNA CORP, 200 SHARES	20,582	20,582
DELTA AIR LINES INC, 500 SHARES	24,595	24,595
DOW CHEMICAL CO, 200 SHARES	9,122	9,122
EATON CORP PLC, 800 SHARES	54,368	54,368
ENSCO PLC SHS CL A, 150 SHARES	4,493	4,493
GENERAL ELECTRIC, 900 SHARES	22,743	22,743
GOLDMAN SACHS GROUP INC, 125 SHARES	24,229	24,229
GOOGLE INC CL A, 60 SHARES	31,840	31,840
GOOGLE INC SHS CL C, 20 SHARES	10,528	10,528
HALYARD HEALTH INC SHS, 53 SHARES	2,410	2,410
HOME DEPOT INC, 400 SHARES	41,988	41,988
HONEYWELL INTL INC DEL, 850 SHARES	84,932	84,932
HORMEL FOODS CORP, 350 SHARES	18,235	18,235
ISHARES U.S. REAL ESTATE, 790 SHARES	60,704	60,704
JOHNSON AND JOHNSON COM, 800 SHARES	83,656	83,656
KIMBERLY CLARK, 425 SHARES	49,105	49,105
KINDER MORGAN INC. DEL, 225 SHARES	9,520	9,520
LINCOLN NTL CORP IND NPV, 300 SHARES	17,301	17,301
LINKEDIN CORP, 75 SHARES	17,228	17,228
OCCIDENTAL PETE CORP CAL, 300 SHARES	24,183	24,183
PEPSICO INC, 175 SHARES	16,548	16,548
PROCTER & GAMBLE CO, 150 SHARES	13,663	13,663
PRUDENTIAL FINANCIAL INC, 200 SHARES	18,092	18,092
STANLEY BLACK & DECKER, 250 SHARES	24,020	24,020
STARBUCKS CORP, 425 SHARES	34,871	34,871
THERMO FISHER SCIENTIFIC, 75 SHARES	9,397	9,397

Name of Stock	End of Year Book Value	End of Year Fair Market Value
UNITEDHEALTH GROUP INC, 150 SHARES	15,163	15,163
VENTAS INC, 125 SHARES	8,962	8,962
VERIZON COMMUNICATNS COM, 900 SHARES	42,102	42,102

TY 2014 Investments - Other Schedule

Name: LUMOS

EIN: 20-8203226

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
MLCX ARN ISSUER BAC, 10,800 SHARES	FMV	70,956	70,956

TY 2014 Other Assets Schedule

Name: LUMOS

EIN: 20-8203226

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
FEDERAL EXCISE TAX RECOVERABLE	591	0	0

TY 2014 Other Expenses Schedule

Name: LUMOS

EIN: 20-8203226

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT - BANK SERVICE CHARGE	300	300		0
OTHER MISCELLANEOUS EXPENSES	837	0		837

TY 2014 Other Increases Schedule

Name: LUMOS

EIN: 20-8203226

Description	Amount
CHANGE IN UNREALIZED GAIN/LOSS	126,687

TY 2014 Other Liabilities Schedule

Name: LUMOS

EIN: 20-8203226

Description	Beginning of Year - Book Value	End of Year - Book Value
DEFERRED FEDERAL EXCISE TAX	6,103	8,637
FEDERAL EXCISE TAX PAYABLE	0	353

TY 2014 Other Professional Fees Schedule

Name: LUMOS

EIN: 20-8203226

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGER FEES	17,665	17,665		0

TY 2014 Taxes Schedule

Name: LUMOS

EIN: 20-8203226

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
CURRENT AND DEFERRED FEDERAL EXCISE TAXES	6,178	0		0