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Return of Private Foundation

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

OMB No 1545-0052

Department of the Treasury Internal Revenue Service

Do not enter social security numbers on this form as it may be made public. Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf.

Fo	r calen	dar year 2014 or tax year beginni	ng		,	and e	ending			
Naı	me of fou	indation					A Employer	identification number		
		and Evelyn M Schultz Family Four								
		I street (or PO box number if mail is not delive	ered to street address)		Room/si	uite		23-2902342		
-		stnut Street					B Telephone	number (see instruction	18)	
`	y or town		State	ZIP ∞				640 067 044	•	
	maus		PA	1804			* "	610-967-214		
rui	eign cou	ntry name Foreign pro	ovince/state/county	Foreig	n postal o	code	C If exempt	ion application is pendin	g, check here	►□
G	Check	all that apply Initial return	☐ Initial return (of a former pu	blic cha	arity	D 1 Foreign	n organizations, check h	070	►□
	0,,00	Final return	Amended ret	•	DIIC G16	anty	•	· ·		· 🗀
		☐ Address chang	=				_	n organizations meeting here and attach comput		►□
H	Check		501(c)(3) exempt pri		າກ			foundation status was te		
Ä.		ction 4947(a)(1) nonexempt charitable trust						7(b)(1)(A), check here		▶ 📗
<u></u>			Accounting method	X Cash						
•	Fair market value of all assets at an analysis of year (from Part II, col. (c), Other (specify)				F if the foundation is in a 60-month termination under section 507(b)(1)(B), check here					
		-	art I, column (d) must be	e on cash basis	s.)		dilder see	2011 307 (0)(1)(0); G1004	no.c	, _—
P	art I								(d) Disburse	ements
		amounts in columns (b) (c) and (d) may not necessarily expenses per (b) No				investment	(c) Adjusted net	for chanta		
		equal the amounts in column (a) (see		books	1	ın	come	ıncome	purpose (cash basis	
	1	Contributions, gifts, grants, etc , received	(attach schedule)						· · · · · · · · · · · · · · · · · · ·	
	2	Check ▶☐ if the foundation is not rec								
	3	Interest on savings and temporary			1		1			
A	4	Dividends and interest from securi	ties	34	,371		34,371			
ij	5a	Gross rents								;
	b	Net rental income or (loss)	 							
e e	6a	Net gain or (loss) from sale of asse		19	,345					
, E	_ b	Gross sales price for all assets on line 6a					40.045			
SCARRE	7	Capital gain net income (from Part	(IV, line 2)				19,345	 		
	8 9	Net short-term capital gain			—					 i
	10a	Gross sales less returns and allowances	1		-+		 -			
變	b	Less Cost of goods sold .								
32	c	Gross profit or (loss) (attach sched	dule) .							
Ü	11	Other income (attach schedule)								1
ď	12	Total. Add lines 1 through 11		53	,717		53,717	0		
	13	Compensation of officers, directors	s, trustees, etc.							
Se	14	Other employee salaries and wage	es							
e	15	Pension plans, employee benefits								
άx	16a	Legal fees (attach schedule) ED			_					
E C	b	Accounting fees (affach schedule)	S		_					
Operating and Administrative Expenses	C	Other professional fees (attach school interest in 2015	negnie)		 -∤					
tra	17) (C) 1 · · · · · · · · · · · · · · · · · ·		462		200			
S	18 19	Taxes (attach schedule) (see instru			,463		399		· · · · · · · · · · · · · · · · · · ·	
喜	20	Depreciation (attach schedule)jand Occupancy	a depiction		-+					
ğ	21	Travel, conferences, and meetings	, · ·		-+			· · · · · · · · · · · · · · · · · · ·		
D	22	Printing and publications .			-		-			
a	23	Other expenses (attach schedule)								
gu	24	Total operating and administrative	ve expenses.		\Box					
ati		Add lines 13 through 23			,463		399	0		0
ě	25	Contributions, gifts, grants paid	·	39	,710				3	9,710
ō	26	Total expenses and disbursements. Ad	ld lines 24 and 25	41	,173		399	0	3	9,710
	27	Subtract line 26 from line 12			_					1
	a	Excess of revenue over expenses and		12	,544					
	b	Net investment income (if negative	-				53,318			
لب	_ с	Adjusted net income (if negative,			L			0	000 ==	
	•	work Reduction Act Notice, see inst	tructions.					~ A D For	ա 990-PF	(2014)
HTA								914		
								1		

P:	art II	Balance Sheets Attached schedules and amounts in the description column	Beginning of year	End o	year
		should be for end-of-year amounts only. (See instructions.)	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash—non-interest-bearing	ļ		
	2	Savings and temporary cash investments	14,625	5,800	5,800
	3	Accounts receivable			
		Less: allowance for doubtful accounts			
	4	Pledges receivable		i	
		Less. allowance for doubtful accounts			
	5	Grants receivable	<u></u>		
	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			
Assets	8	Inventories for sale or use			
936	9	Prepaid expenses and deferred charges			
₹	10a	Investments—U.S. and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	249,146	273,475	384,732
	С	Investments—corporate bonds (attach schedule) .	425,951	422,992	462,700
	11	Investments—land, buildings, and equipment basis			
		Less accumulated depreciation (attach schedule)			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment basis			
		Less: accumulated depreciation (attach schedule)			•
	15	Other assets (describe)			
	16	Total assets (to be completed by all filers—see the			
		instructions Also, see page 1, item I)	689,722	702,267	853,232
	17	Accounts payable and accrued expenses			
w	17 Accounts payable and accrued expenses	Grants payable			
Ë		Deferred revenue			ı
ቜ	20	Loans from officers, directors, trustees, and other disqualified persons			
Liabilities	21	Mortgages and other notes payable (attach schedule)	-		
_	22	Other liabilities (describe)			!
	23	Total liabilities (add lines 17 through 22)	0	0	'
		Foundations that follow SFAS 117, check here			
alances		and complete lines 24 through 26 and lines 30 and 31.			
ğ	24	Unrestricted			I
ali	25	Temporarily restricted			1
	26	Permanently restricted			1
Ĕ		Foundations that do not follow SFAS 117, check here			;
Net Assets or Fund B		and complete lines 27 through 31.			
٥	27	Capital stock, trust principal, or current funds			1
ş	28	Paid-in or capital surplus, or land, bldg, and equipment fund			1
SS	29	Retained earnings, accumulated income, endowment, or other funds	689,722	702,267	i
۲	30	Total net assets or fund balances (see instructions)	689,722	702,267	ŀ
횾	31	Total liabilities and net assets/fund balances (see			
-		instructions)	689,722	702,267	
Pa	rt III	Analysis of Changes in Net Assets or Fund Balances			· · · · · · · · · · · · · · · · · · ·
_		net assets or fund balances at beginning of year—Part II, column (a),	line 30 (must agree w	ith	
		f-year figure reported on prior year's return)		1	689,722
2		amount from Part I, line 27a		. 2	12,544
		(porococo pot polyded in line 2 (termina)			1
		nes 1, 2, and 3		4	702,267
5	Decre	eases not included in line 2 (itemize)		5	=======================================
		net assets or fund balances at end of year (line 4 minus line 5)—Part	II, column (b), line 30	. 6	702,267

Part	V Capital Gains and	d Losses for Tax on Investn	nent Income					
	(a) List and describe to 2-story brick wareho	he kınd(s) of property sold (e.g., real estate, ouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acc		(d) Date sold (mo , day, yr)	
1a	JP MORGAN CHASE 4.5	% PFD		Р	5/14	4/2013	9/25/2014	
b	DB CONT CAP TR6.55%			Р	7/9	9/2008	9/25/2014	
C								
d							 	
<u>e</u>			·	<u> </u>				
	(e) Gross sales price	(f) Deprecation allowed (or allowable)		r other basis ense of sale		(h) Gain or (e) plus (f) mi		
a	18,812			22,105			-3,293	
<u>b</u> _	11,485			9,078			2,407	
<u>c</u>					_			
<u>d</u>								
е				4004/00				
•	Complete only for assets sr	nowing gain in column (h) and owned	•			(I) Gains (Col. (h) gain minus		
	(i) FM V. as of 12/31/69	(j) Adjusted basis as of 12/31/69		ssofcol(ı) .(j), ifany		ol (k), but not less than -0-) or Losses (from col. (h))		
а							-3,293	
b							2,407	
С				7 . 1				
d								
е								
2	Capital gain net income or	Ther canital inee!	also enter in Pai , enter -0- in Pai	> 1	2		19,345	
3	Net short-term capital gair	or (loss) as defined in sections 1		·				
	If gain, also enter in Part I,	, line 8, column (c) (see instruction	ns). If (loss), ente	er-0-in լ				
	Part I, line 8 .				3		0	
Part	V Qualification Und	der Section 4940(e) for Redu	iced Tax on N	let investment	Income			
Was t	tion 4940(d)(2) applies, leav the foundation liable for the s," the foundation does not d	section 4942 tax on the distributal qualify under section 4940(e) Do	ole amount of an	ny year in the base s part	period?	!	☐ Yes ☒ No	
1	Enter the appropriate amo	unt in each column for each year;	see the instruct	ions before makin	g any entrie	S		
Cal	(a) Base penod years endar year (or tax year beginning in)	(b) Adjusted qualifying distributions	Net value o	(c) of nonchantable-use as	sets	Distribut	d) tion ratio led by col (c))	
	2013		3,560	803	,634	(00) (0) (1)10	0.047982	
	2012		5,800		,860		0.046684	
	2011		1,200		,300	·	0.046766	
	2010	27	7,210		,169		0.039029	
	2009	3.	1,743	551	,251		0.057584	
2	Total of line 1, column (d)				2		0 238045	
3	. ,	or the 5-year base period-divide	the total on line	2 by 5 or by the			0 230043	
•		lation has been in existence if less			. 3		0.047609	
4	Enter the net value of none	charitable-use assets for 2014 fro	m Part X, line 5		4		845,795	
5	Multiply line 4 by line 3 .				5		40,267	
6	Enter 1% of net investmen	nt income (1% of Part I, line 27b)			. 6		533	
7	Add lines 5 and 6 .				7		40,800	
8	Enter qualifying distribution	ns from Part XII, line 4			8		39,710	
	If line 8 is equal to or great Part VI instructions.	ter than line 7, check the box in Pa	art VI, line 1b, ai	nd complete that p	art using a	1% tax rat	e. See the	

Part v	Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see instructions			
1a	Exempt operating foundations described in section 4940(d)(2), check here and enter "N/A" on line 1 Date of ruling or determination letter: (attach copy of letter if necessary—see instructions)			
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check		1,066	
	here ▶ ☐ and enter 1% of Part I, line 27b			1
С	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-) .		0	
3	Add lines 1 and 2		1,066	
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			
5	Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0		1,066	
6	Credits/Payments Credits/Payments/Pa			
а	2014 estimated tax payments and 2013 overpayment credited to 2014 6a 6a			
b	Exempt foreign organizations—tax withheld at source . 6b .			
C	Tax paid with application for extension of time to file (Form 8868)			
d	Backup withholding erroneously withheld			
7	Total credits and payments. Add lines 6a through 6d		0	
8	Enter any penalty for underpayment of estimated tax. Check here X if Form 2220 is attached 8		19	<u> </u>
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed ▶ 9		1,085	<u> </u>
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid		0	_
11	Enter the amount of line 10 to be: Credited to 2015 estimated tax ► Refunded ► 11		0	
	VII-A Statements Regarding Activities	-1	V	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it	4-	Yes	No X
_	participate or intervene in any political campaign?	1a		-
b		1 _b		x
	Instructions for the definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials	10	 	 ^
	published or distributed by the foundation in connection with the activities			ļ
c	Did the foundation file Form 1120-POL for this year?	1c		x
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year	1.0		
_	(1) On the foundation > \$ (2) On foundation managers. > \$			
е	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed	'		
	on foundation managers ►\$			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2	Ì	X
	If "Yes," attach a detailed description of the activities			
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles			
	of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		X
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b	N/A	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5		Х
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:			
	By language in the governing instrument, or			İ
	By state legislation that effectively amends the governing instrument so that no mandatory directions that			
	conflict with the state law remain in the governing instrument?	6	X	
7	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	7	X	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions)			
	PA	.		
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General	1		_
	(or designate) of each state as required by General Instruction G? If "No," attach explanation	8b	X	L
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3)	_		
	or 4942(j)(5) for calendar year 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)? If			
	"Yes," complete Part XIV	9		X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their			
	names and addresses	10		<u> </u>

Part	VII-A Statements Regarding Activities (continued)			
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the			
	meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified	1		ļ
	person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	<u> </u>
	Website address			
14	The books are in care of ► WILMER R SCHULTZ, PRESIDENT Telephone no. ► (610) 96	7-214	1	
	Located at ► 1540 CHESTNUT STREET EMMAUS PA ZIP+4 ► 18049-1	910		
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			
16	At any time during calendar year 2014, did the foundation have an interest in or a signature or other authority	1	Yes	No
	over a bank, securities, or other financial account in a foreign country?	16		<u> </u>
	See the instructions for exceptions and filing requirements for FinCEN Form 114, (formerly TD F 90-22.1) If			
Dow	"Yes," enter the name of the foreign country	L		L
Par	VII-B Statements Regarding Activities for Which Form 4720 May Be Required	1	V	
_	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.	·	Yes	No
1a	During the year did the foundation (either directly or indirectly).			·
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? Yes X No	1		
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? Yes X No			l .
	disqualified person?			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?			i r
	(5) Transfer any income or assets to a disqualified person (or make any of either available for	1		i
	the benefit or use of a disqualified person)?			i
	(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)			1
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	N/A	
	Organizations relying on a current notice regarding disaster assistance check here			
С	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that	İ		ا . ا
	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))			1
а	At the end of tax year 2014, did the foundation have any undistributed income (lines 6d and	ł		,
	6e, Part XIII) for tax year(s) beginning before 2014?			
	If "Yes," list the years 20, 20, 20, 20			'
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2)			!
	(relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to			}
	all years listed, answer "No" and attach statement—see instructions)	2b	N/A	
С	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.			
2-	Dud the foundation hold more than a 3% direct or indirect interest in any bysiness externion			1
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?			'
h	If "Yes," did it have excess business holdings in 2014 as a result of (1) any purchase by the foundation or			
b	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	N/A	ال ا
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	10/7	X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its	-~		 ``
	chantable 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 W	hich Form	4720 N	May Be Ro	equire	d (contin	ued)			
5a		e year did the foundation pay or incur any on propaganda, or otherwise attempt to it	amou	nt to				Yes		,		
		nce the outcome of any specific public ele y or indirectly, any voter registration drive		see section 49	•	•	١,	☐ Yes	X No			
		le a grant to an individual for travel, study							X No			
	(4) Provid	de a grant to an organization other than a n 4945(d)(4)(A)? (see instructions)	charita	ble, etc., orga		n described	l in	Yes	— 区 No	,		
		le for any purpose other than religious, ch ses, or for the prevention of cruelty to chil	other than religious, charitable, scientific, literary, or educational vention of cruelty to children or animals?							,		
b		wer is "Yes" to 5a(1)-(5), did any of the to			ialify un	der the exc	eptions	describe	d in			
		ns section 53 4945 or in a current notice								5b	N/A	
С	If the ans	tions relying on a current notice regarding wer is "Yes" to question 5a(4), does the fo t maintained expenditure responsibility fo	undati	on daim exen				·	► □ No			
	If "Yes," a	ttach the statement required by Regulation	ns sec	tion 53.4945-	-5(d)							
6a		undation, during the year, receive any fur onal benefit contract?	nds, dire	ectly or indire	ctly, to p	pay premiui	ms	Yes	⊠ No	,		
b		undation, during the year, pay premiums,	directly	y or indirectly,	on a p	ersonal ber	nefit cor	ntract?		6b		Χ
		6b, file Form 8870						_				
7a b	At any time	e during the tax year, was the foundation a pa id the foundation receive any proceeds or	rty to a	prohibited tax s	shelter t	ransaction?		Yes	X No	1	NI/A	
		nformation About Officers, Director							aid Fm		N/A	
		and Contractors	, , , , ,	1401000, 1 0		on mana;	g010, 1	ngmy i	uiu Lii	.p.o,c	 ,	
1	List all of	ficers, directors, trustees, foundation r	nanag	ers and their	compe	ensation (s	ee inst	ructions).				
		(a) Name and address	hou	e, and average irs per week ted to position	`´(If r	mpensation not paid, nter -0-)	emple	Contributions byee benefit ferred compe	plans	(e) Expe	nse acc allowan	
See A	tached Sta	atement		-								
				.00		0						
				.00		0						
				.00		0						
				00		•						
2	Compone	ation of five highest-paid employees (othor ti	.00.	aldad	0			\ If ==			
	"NONE."	ation of five highest-paid employees (ouier u	nan unose me	ciudea	on line 1—	-see ins				er 	
_	(a) Name an	d address of each employee paid more than \$50,000		(b) Title, and a hours per w devoted to po	reek	(c) Comper	isation	(d) Contribution employee plans and compens	benefit leferred	(e) Expe	nse acc illowan	
					00		0					
	·				00		0					
					.00		0					
NO C	OMPENSA	ATION PAID								•		
					00		0					
	.00 0											
Total r	number of	other employees paid over \$50,000 .							•			

	Information About Officers, Directors, Trustees, Foundati and Contractors (continued)	on Managers, Highly Paid Er	nployees,
	hest-paid independent contractors for professional services (see	instructions). If none, enter "NOI	NE."
	(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE			
			
			<u> </u>
Total number of	f others receiving over \$50,000 for professional services		
			<u> </u>
Part IX-A	Summary of Direct Charitable Activities		
	n's four largest direct chantable activities during the tax year. Include relevant statistical infedit other beneficianes served, conferences convened, research papers produced, etc.	ormation such as the number of	Expenses
1 N/A			
2			
•			
			i
3			
· 			
4			
•			
]
Part IX-B	Summary of Program-Related Investments (see instruction	ons)	
· · · · · · · · · · · · · · · · · · ·	largest program-related investments made by the foundation during the tax year on lines 1	and 2	Amount
1			
2			
	-related investments. See instructions		
3		****	
Total. Add lines	1 through 3	▶	
			om 990-PF (2014

Part		n founda	itions,
	see instructions.)		·
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc.		
•	purposes Average monthly fair market value of securities		042.054
a		1a	843,951
C	Average of monthly cash balances	1b 1c	14,724
d	Total (add lines 1a, b, and c)	1d	858,675
e	Reduction claimed for blockage or other factors reported on lines 1a and	'0	000,070
·	1c (attach detailed explanation)		
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	858,675
4	Cash deemed held for charitable activities Enter 1 ½ % of line 3 (for greater amount, see		000,070
	instructions)	4	12,880
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	845,795
6	Minimum investment return. Enter 5% of line 5	6	42,290
Part			
1	Minimum investment return from Part X, line 6	1	42,290
2a	Tax on investment income for 2014 from Part VI, line 5		12,200
b	Income tax for 2014 (This does not include the tax from Part VI.)	1	
С	Add lines 2a and 2b	2c	1,066
3	Distributable amount before adjustments Subtract line 2c from line 1	3	41,224
4	Recovenes of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	41,224
6	Deduction from distributable amount (see instructions)	6	· · · · · · · · · · · · · · · · · · ·
7	Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII,		
	line 1 .	7	41,224
Part	Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
' a	Francisco and the transfer of	1a	20.740
b	Program-related investments—total from Part IX-B	1b	39,710
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.	-	
а	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	39,710
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income.	-	33,710
-	Enter 1% of Part I, line 27b (see instructions)	5	
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	39,710
-	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating wheth		
	qualifies for the section 4940(e) reduction of tax in those years	J. 2.2.10	

1 Distributable amount for 2014 from Part XI, (a) Corpus Years prior to 2013 2013 2014	Part	XIII Undistributed Income (see instructions	5)			
line 7 Undistributed moome, if any, as of the end of 2014: a Enter amount for 2013 only b Total for prior years 20 20 20 Excess distributions carryover, if any, to 2014 a From 2010 c From 2010 c From 2011 d From 2012 e From 2013 f Total of these 3a through e 4 Qualifying distributions for 2014 from Part XII. line 4: ▶ \$ 39,710 a Applied to 2013, but not more than line 2a b Applied to 2015, but not more than line 2a b Applied to 2015, but not more than line 2a client or required—see instructions) c Treated as distributions out of corpus (Election required—see instructions) d Applied to 2014 distributable amount required—see instructions) d Applied to 2014 distributable amount general rease instructions out of corpus (Election required—see instructions) f Excess distributions carryover applied to 2014. (If an amount appears in column (a), the same amount must be shown in column (a).) Enter the not total of each column as indicated below. Corpus Add lines 31 4c, and 4e. Subtract line 5 D 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 instructions f Undistributed income for 2013 Subtract line 4 a from line 2a Taxable amount—see instructions f Undistributed income for 2013 Subtract line 4 a from line 2a Taxable amount—see instructions f Undistributed income for 2014 Subtract line 4 a from line 2a Taxable amount—see instructions f Undistributed income for 2014 Subtract line 4 a from line 2a Taxable amount—see instructions f Undistributed income for 2013 Subtract line 4 a from line 2a Taxable amount—see instructions f Undistributed income for 2013 Subtract line 4 a from line 2a Taxable amount—see instructions f Undistributed income for 2013 Subtract line 4 and 5 from line 1. This amount must be distributed in line 5 of line 7 (see instructions) 8 Excess distributions carryover from 2009 not applied on line 5 of line 7 (see instructions) 9 Excess distributions carryover to 2015. Subtract line 7 (see			(a)			
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a Excess from 2010 b Excess from 2011	10					
b Excess from 2011		· · · · · · · · · · · · · · · · · · ·				
	a h					
		E (2040				
d 50000 from 2042	4	Fuer en 6040				
e Excess from 2014	_		}			

Part	XIV Private Operating Foundat	ions (see instru	ictions and Part \	VII-A, question 9)		N/A
1a			•	ite operating	-	
	foundation, and the ruling is effective fo			▶ [
b	Check box to indicate whether the foundation	on is a private opera	ating foundation desc	nbed in section	4942(j)(3) or 4942(j)(5)
2a	Enter the lesser of the adjusted net income from Part I or the minimum	Tax year		Pnor 3 years		(e) Total
	investment return from Part X for	(a) 2014	(b) 2013	(c) 2012	(d) 2011	(6) 10(8)
	each year listed		<u> </u>			. 0
b	85% of line 2a					0
С	Qualifying distributions from Part XII, line 4 for each year listed .					0
d	Amounts included in line 2c not used directly for active conduct of exempt activities					
_	•		+	 		0
е	Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c.					0
3	Complete 3a, b, or c for the	1				
	alternative test relied upon	Ì				
а	"Assets" alternative test—enter			ļ		
	(1) Value of all assets	i				0
	(2) Value of assets qualifying under					
	section 4942(j)(3)(B)(i) .					0
b	"Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					0
С	"Support" alternative test—enter:					
Ū	(1) Total support other than gross					
	investment income (interest,			1		
	dividends, rents, payments on		1			
	secunties loans (section 512(a)(5)), or royalties)					0
	(2) Support from general public					0
	and 5 or more exempt					
	organizations as provided in					
	section 4942(j)(3)(B)(iii)					0
	(3) Largest amount of support from					
	an exempt organization			ļ		0
	(4) Gross investment income	<u> </u>	<u> </u>	<u> </u>		0
Part		•	•	e foundation had	1 \$5,000 or moi	e in assets at
	any time during the year—		18.)			
1	Information Regarding Foundation M					
а	List any managers of the foundation wh					foundation
	before the close of any tax year (but only	ly if they have con	tributed more than	\$5,000) (See section	n 507(d)(2).)	
		SCHULTZ,DEC			-	
þ	List any managers of the foundation wh				qually large portio	n of the
	ownership of a partnership or other enti-	ty) of which the fo	undation has a 10%	% or greater interest.		
2	Information Regarding Contribution,	Grant, Gift, Loan	, Scholarship, etc.	., Programs:		
	Check here ▶ ☐ If the foundation on	ly makes contribu	tions to preselected	d charitable organiza	itions and does no	t accept
	unsolicited requests for funds If the fou		ts, grants, etc (see	instructions) to indi-	viduals or organiza	ations
	under other conditions, complete items	2a, b, c, and d	_			
а	The name, address, and telephone num	nber or e-mail add	ress of the person	to whom applications	s should be addre	ssed
Wilme	r R and Evelyn M.Schultz Foundation 1	540 Chestnut Stre	et Emmaus PA 18	049 (610) 967-2141		
	The form in which applications should b				dude	
	telli ili ililon applicationo snotita b	- Japanica and I	ormadon and mat	onalo aley siloulu III	~duo	
501/c	(3) approval letter, needs report and activ	uties description				
	Any submission deadlines	inga deacribingi				
	•					
	of current year		anabiael ·		-£ (m -4.4: -4)	
a	Any restrictions or limitations on awards	s, such as by geog	prapnicai areas, cha	entadie fields, kinds (or institutions, or o	rner
	factors					
none						

Supplementary Information (continued)

Part XV

Page 11

Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, Recipient Foundation show any relationship to Purpose of grant or status of Amount any foundation manager contribution recipient Name and address (home or business) or substantial contributor Paid during the year PALM SCHWENKFELDER CHURCH NONE PC GENERAL OPERATING/MAINT. 6,000 **PO BOX 66** PALM, PA 18070-0066 SCHWENKFELDER LIBRARY&HERITAGE CTR **NONE** PC GENERAL OPERATING FD. 5.000 105 SEMINARY AVENUE PENNSBURG, PA 18073 **AMERICAN CANCER SOCIETY** NONE PC **RELAY FOR LIFE** 1,500 PO BOX 66 PALM, PA 18070-0066 SHRINERS HOSPITAL FOR CHILDREN NONE PC CHILDREN'S HOSPITAL 2,500 3551 NORTH BROAD ST PHILADELPHIA, PA 19104 MINSI TRAILS COUNCIL-BOY SCOUTS AMERICA NONE PC GENERAL OPERATING FD. 1,500 PO BOX 20624 LEHIGH VALLEY, PA 18002-0624 **GOOD SHEPHERD PLAZA NONE** PC REHAB/PEDIATRIC CARE 1,000 850 SOUTH 3RD STREET **ALLENTOWN, PA 18103** JENNS HOUSE, INC NONE PC AFFORD LODGING NEEDY FAM 1,500 3250 S CEDARCREST BLVD. **EMMAUS, PA 18049 CAMP COMPASS** PC NONE URBAN CHILD OUT LEARN 1,500 1221 SUMNER AVE(REAR) **ALLENTOWN, PA 18104** THE HILLSIDE SCHOOL PC NONE **SCHOLARSHIPS** 1,000 2697 BROOKSIDE ROAD MACUNGIE, PA 18062 PERKIOMEN SCHOOL NONE PC GENL OPERATING/NEW DORMS 3,500 200 SEMINARY STREET, PO BOX 130 PENNSBURG, PA 18073-0130 GIST CANCER RESEARCH FD NONE PC **GIST RESEARCH** 1,000 55 SAW MILL ROAD NEW CITY, NY 10956 Total See Attached Statement 3a 39,710 **b** Approved for future payment **Total** 0

(d) de Amount	
(d) de Amount	1
	(e) Related or exempt function income (See instructions)
	
	
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1	
34,371	
19,345	
53,717	0
. 13	53,717
	
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ted importantly to the	
poses) (See instructi	0115 /
 	
	
	
	

Part	ΧVI	Information Exempt Org	Regarding Trans	sfers To and Tr	ansaction	s and Ro	elationships Wit	h Noncharitable)	×
1	ın s	the organization d	rectly or indirectly ele e Code (other than s		_	•	•		Yes	No
а	_		orting foundation to	a noncharitable ex	rempt organ	ization of				
_								1a(1	\ \	х
		Other assets						1a(2		$\frac{\hat{x}}{x}$
b		er transactions							1	-~
	(1)	Sales of assets to	a nonchantable exer	mpt organization				16(1)	х
			ts from a noncharita		zation			1b(2		X
	(3)	Rental of facilities,	equipment, or other	assets .				1b(3		Х
	(4)	Reimbursement ar	rangements					1b(4)	Х
	(5)	Loans or loan gua	rantees					. 1b(5)	Х
	(6)	Performance of se	rvices or membershi	ip or fundraising so	olicitations			1b(6)	Х
С	Sha	ring of facilities, ed	quipment, mailing fist	ts, other assets, or	r paid emplo	yees .		1c		Х
d			he above is "Yes," con er assets, or services g							
	valu	e in any transaction	or sharing arrangeme	ent, show in column	(d) the value	of the goo	ds, other assets, or	services received.		
Line	no	(b) Amount involved	(c) Name of nonc	chantable exempt organ	nization	(d) Des	conption of transfers, tran	sactions, and shanng am	angemer	ıts
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	des	cribed in section 5	L	ited with, or related ther than section 5	d to, one or 501(c)(3)) or	more tax- in section	exempt organization	ns Yes	X N	0
	., .	(a) Name of organ		(b) Type	of organization		(c) De	scription of relationship	_	
					· · · ·					
		<u> </u>					· - ·.			
										
	Und	er penalties of penury, I deci	are that I have examined this re	eturn, includino accompanyir	ng schedules and s	tatements, and	to the best of my knowledne	and belief, it is true		
gn	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Qestaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge						n thus'	_		
	1	VI PC	1.14	5-12-	./e DD	COIDENT		May the IRS discus with the preparer sh		
ere		nature of officer or ards	tee		Title	ESIDENT		(see instructions)?		_
		Print/Type preparer's	<i>U</i>	Preparer's signatur		_	Date	PTIN		
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Part IV (990-PF) - Capital Gains and Losses for Tax on Investment Income

Wilmer R and Evelyn M Schultz Family Foundation

•		8	.x	慧		器	60	0
•			Gains Minus Excess	of FMV Over Adjusted	Basis or Losses			
		0		Excess of FMV	Over Adj Basis	0	0	0
		0	Adjusted Basis	83 of	12/31/69	0	0	0
		0		FMV as of	12/31/69	0	0	0
		88			Gain or Loss	-3,293	2,407	0
		31,183	Cost or Other	Basis Plus	Expense of Sale	22,105	870'6	0
		0			Adjustments			
		0		Depreciation	Allowed			
		30,297		Gross	Sales Pnce	18,812	11,485	
				Date	Sold	9/25/2014	9/25/2014	
				Date		5/14/2013	2/9/2008	
				Acquistion	Method	۵	Ь	
Amount	20,231	0			CUSIP#	46637G124	25153X208	
	Long Term CG Distributions	Short Term CG Distributions			Description of Property Sold	1 JP MORGAN CHASE 4 5% PFD	2 DB CONT CAP TR6 55%	3
								ш

Part I, Line 18 (990-PF) - Taxes

		1,463	399	C	0
	Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Chantable Purposes
1	Real estate tax not included in line 20				
2	Tax on investment income	1,064		····	
3	Income tax-withheld on dividends	399	399	-	

Part II, Line 10b (990-PF) - Investments - Corporate Stock

			249,146	2/3,4/5	3/3,966	384,732
		Num. Shares/	Book Value	Book Value	FMV	FMV
	Description	Face Value	Beg. of Year	End of Year	Beg of Year	End of Year
1	NEW PERSPECTIVE FUND	9441 99 SHS	800'802	230,271	331,825	
7	AT&T	925 889 SHS	22,453	23,621	21,884	22,031
6	VERIZON	430.646 SHS	18,685	19,583	20,257	

Part II, Line 10c (990-PF) - Investments - Corporate Bonds

			425,951	422,992	435,530	462,700
	Interest	Maturity	Book Value	Book Value	FMV	FMV
Description	Rate	Date	Beg. of Year	End of Year	Beg of Year	End of Year
REFERREDS/FIXED RATE CAP SECUR.	VARIOUS	VARIOUS	425,951	422,992	435,530	462,700

Part IV (990-PF) - Capital Gains and Losses for Tax on Investment Income

	Amount												•
Long Term CG Distributions													
Short Term CG Distributions	0				50,528	0	9	31,183	19,345	0	0	0	19,345
								Cost or Other			Adjusted Basis		Gains Minus Excess
		Acquisition	age	Date	Gross	Deprecation		Basis Plus		F.M V as of	asol	Excess of FMV	of FMV Over Adjusted
Description of Property Sold	CUSIP#	Method	Acquired	Sod	Sales Proe	Allowed	Adjustments	Expense of Sale	Gain or Loss	12/31/69	12/31/69	Over Adj Basis	Basis or Losses
1 JP MORGAN CHASE 4 5% PFD	46637G124	d.	5/14/2013 9/25/2014	9/25/2014	18,812			22,105	-3,293	0	0		3283
2 DB CONT CAP TR6 55%	25153X208	a.	2/9/2008	9/25/2014	11,485			9,078	2,407	0	0		2,407
3 AMERICAN FOS NEW PERSPECTIVE	648018109	۵	VARIOUS 12/29/2014	12/29/2014	20,231			0	20,231	0	0		20,231

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Part VIII, Line 1 (990-PF) - Compensation of Officers, Directors, Trustees and Foundation Managers

									0	0	
Name	Check "X" if Business	Street	Cıty	State	Zip Code	Foreign Country	Title	Avg Hrs Per Week	Compensation	Benefits	Expense Account
WLMER R. SCHULTZ		584 PINE STREET	EMMAUS	PA	PA 18049		PRES.	1 00			
KEVIN R SCHULTZ		7448 STEIN ROAD	ZIONSVILLE	₹	18092		SECTY	090			
KAREN L SCHULTZ		7448 STEIN ROAD	ZIONSVILLE	₹	18092		TRUSTEE	050			
SCOTTR SCHULTZ		23 MOLL LANE	MACUNGIE	PA T	18062		TREAS	0.50			
KARLA R. SCHULTZ		23 MOLL LANE	MACUNGIE	PA T	18062		TRUSTEE	0.50			

Foundation Status

Amount

2,000

PC

Relationship

Purpose of grant/contribution

WOUNDED MILITARY PERSONNEL

NONE

Amount

Purpose of grant/contribution

Par	t VIII,	Line 3	(990-PF) - High	est-Paid Inder	pendent Contractors for P	rofessional Services
	Nam	e and addn	ess of each person pa			(c) Compensation
	Name _					
1.	Street_				 	
			ST_	ZIP	Explanation	
		Business	Foreign Country			
	Name _ Street					
2.	City			ZIP	Explanation	
		Business		E''	CXpianation	
	Name	0000001	1 / Groigir Godinay			
	Street					
3.	City		ST	ZIP	Evalenation	
	-	ĭ			Explanation	
		Business	Foreign Country	 		
	Name _					
4.	Street _					
٠.	City_		ST_	ZIP	Explanation	
	Check if	Business	Foreign Country			
	Name	•		······································		
	Street		· · · · · · · · · · · · · · · · · · ·	· · · · · · · · · · · · · · · · · · ·		
5.	City		ST	ZIP	Explanation	
	_		Foreign Country	- "	CXPIailation	
	Cneck if	Business	Totalgii Country	 		
	5 6 7 8					5 6 7 8
	ğ —					9
	10 Total					10 38,127
<u> 1</u>	 Undi Undi Undi 	stributed in stributed in stributed in	ncome for the 3rd yea ncome for the 4th yea ncome for the 5th yea	r 2012 r 2011 r 2010 .	distributed Income for Pri	
_	4 Total		<u>.</u>	·	<u> </u>	4 0
<u>i</u>	 Amo Amo Subt Amo 	unt from Pa unt from Pa ract Line 2 unt from Pa	ne 13 (990-PF) art XVI-A, Line 13 art I, Line 5b from Line 1 art I, Line 1			1 53,717 2 0 3 53,717 4 0 62,717
		Lines 3 and				53,717
			art I, Line 5a .			6 0
		Lines 5 and				53,717
	o va⊲ o ⊏xbe	Lines 7 co	d 9. Must match amai	unt on Line 12. Port	kvi-A, Line 9	9 <u></u>
	a Mag	Lilies / gll	u o iviusi iiialcii amoi	unton Line 12, Part	i, wiumin (a) .	

Options (990-PF)	
Check "X" if the charitable trust became a private foundation by virtue of section 1241(c) of the Pension Protection Act of 2006.	
Check "X" if Exempt foreign organization.	
X Check "X" If the organization is not required to file Schedule XIV.	
Check "X" to Rollover the Grantees' names and addresses from last year's return.	

_,					
<u>Pa</u>	art VI, Line 6a (990-PF) - Estim	nated		 Date	Amount
4	Credit from pnor year return			1	
	First quarter estimated tax payment .			 ;	0
	Second quarter estimated tax payment				
	Third quarter estimated tax payment .			ă	
	Fourth quarter estimated tax payment				
	Other payments				
7	Total	•	· · · · · · · · · · · · · · · · · · ·		
Pa	art VII-A, Line 8a (990-PF) - St	ates V	Vith Which a Copy of This Return	ls Filed	
	Armed Forces the Americas		Louisiana		Palau
	Armed Forces Europe		Massachusetts		Rhode Island
	Alaska		Maryland		South Carolina
	Alabama		Maine		South Dakota
	Armed Forces Pacific		Marshall Islands		Tennessee
	Arkansas		Michigan	<u> </u>	Texas
	American Samoa		Minnesota	<u> </u>	Utah
	Anzona		Missoun	<u></u>	Virginia
	California		Commonwealth of the Northern Mariana Islands	·	US Virgin Islands
	Colorado		Mississippi		Vermont
	Connecticut	<u> </u>	Montana		Washington
	District of Columbia		North Carolina	<u> </u>	Wisconsın
	Delaware		North Dakota	<u> </u>	West Virginia
	Florida		Nebraska	L_	Wyoming
	Federated States of Micronesia	<u> </u>	New Hampshire		
	Georgia	ļ	New Jersey		
	Guam		New Mexico		
	Hawaii		Nevada		
	lowa	<u> </u>	New York		
	Idaho	<u> </u>	Ohio		
	Illinois	<u> </u>	Oklahoma		
	Indiana	 	Oregon		
	Kansas	<u>X</u>	Pennsylvania		
	Kentucky	ı	Puerto Rico		

Part VII-A, Line 14 (990-PF) - Books in care	of					
Name				Person	X	
WILMER R. SCHULTZ, PRESIDENT				Business	\Box	
Address			Telephone no)		
1540 CHESTNUT STREET			(610) 967-21	41		
City	State	Zıp code	Foreign Country			
EMMAUS	PA	18049-1910				