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Return of Private Foundation

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

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Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf.

2014

Open to Public Inspection

For calendar year 2014 or tax year beginning

, and ending

Name of foundation THOMAS M. EVANS, JR. FOUNDATION		A Employer identification number 23-7949413
Number and street (or P.O. box number if mail is not delivered to street address) 6805 W. TRAIL CREEK COUNTY RD BOX 259	Room/suite	B Telephone number 307-733-1334
City or town, state or province, country, and ZIP or foreign postal code WILSON, WY 83014		C If exemption application is pending, check here <input type="checkbox"/>
G 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		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 1,596,517.	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments		3.	3.		STATEMENT 1
4 Dividends and interest from securities		36,675.	36,675.		STATEMENT 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		9,424.			
b Gross sales price for all assets on line 6a		1,129,508.			
7 Capital gain net income (from Part IV, line 2)			9,424.		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less. Cost of goods sold					
c Gross profit or (loss)					
11 Other income					
12 Total. Add lines 1 through 11		46,102.	46,102.		
13 Compensation of officers, directors, trustees, etc		0.	0.		0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees STMT 3		4,489.	0.		0.
c Other professional fees STMT 4		17,664.	8,832.		0.
17 Interest					
18 Taxes RECEIVED STMT 5		1,295.	99.		0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses					
24 Total operating and administrative expenses. Add lines 13 through 23		23,448.	8,931.		0.
25 Contributions, gifts, grants paid		83,859.			83,859.
26 Total expenses and disbursements. Add lines 24 and 25		107,307.	8,931.		83,859.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		<61,205.>			
b Net investment income (if negative, enter -0-)			37,171.		
c Adjusted net income (if negative, enter -0-)				N/A	

9

Part II Balance Sheets

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

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	18,137.	21,096.	21,096.
	2 Savings and temporary cash investments	52,564.	173,170.	173,170.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock STMT 6	1,258,519.	1,125,664.	1,402,251.
	c Investments - corporate bonds	51,849.		
	11 Investments - land, buildings, and equipment: basis ▶			
Less: accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other	66.			
14 Land, buildings, and equipment: basis ▶				
Less: accumulated depreciation ▶				
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)	1,381,135.	1,319,930.	1,596,517.	
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			
	22 Other liabilities (describe ▶)			
23 Total liabilities (add lines 17 through 22)	0.	0.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	1,555,749.	1,555,749.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	<174,614.>	<235,819.>	
30 Total net assets or fund balances	1,381,135.	1,319,930.		
31 Total liabilities and net assets/fund balances	1,381,135.	1,319,930.		

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	1,381,135.
2 Enter amount from Part I, line 27a	2	<61,205.>
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	1,319,930.
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	1,319,930.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a				
b SEE ATTACHED STATEMENTS				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			
b			
c			
d			
e 1,129,508.		1,120,084.	9,424.

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			
b			
c			
d			
e			9,424.

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	9,424.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8		3	N/A

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2013	77,304.	1,487,278.	.051977
2012	77,348.	1,509,817.	.051230
2011	71,932.	1,548,614.	.046449
2010	75,135.	1,523,244.	.049326
2009	92,321.	1,432,515.	.064447

2 Total of line 1, column (d)	2	.263429
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	.052686
4 Enter the net value of noncharitable-use assets for 2014 from Part X, line 5	4	1,587,178.
5 Multiply line 4 by line 3	5	83,622.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	372.
7 Add lines 5 and 6	7	83,994.
8 Enter qualifying distributions from Part XII, line 4	8	83,859.

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

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1.

Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)

b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b

c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).

2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)

3 Add lines 1 and 2

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-

6 Credits/Payments:

a 2014 estimated tax payments and 2013 overpayment credited to 2014

b Exempt foreign organizations - tax withheld at source

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

8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached

9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed

10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid

11 Enter the amount of line 10 to be: Credited to 2015 estimated tax

57. Refunded

6a	800.
6b	
6c	
6d	

Part VII-A Statements Regarding Activities

1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?

b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)?

If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.

c Did the foundation file Form 1120-POL for this year?

d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:

(1) On the foundation. \$ 0. (2) On foundation managers. \$ 0.

e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 0.

2 Has the foundation engaged in any activities that have not previously been reported to the IRS?

If "Yes," attach a detailed description of the activities.

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

4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?

b If "Yes," has it filed a tax return on Form 990-T for this year?

5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?

If "Yes," attach the statement required by General Instruction T.

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?

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

8a Enter the states to which the foundation reports or with which it is registered (see instructions) NONE

b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation

SEE STATEMENT 7

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

10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses

	Yes	No
1a		X
1b		X
1c		X
2		X
3		X
4a		X
4b		
5		X
6	X	
7	X	
8b		X
9		X
10		X

N/A

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X	
14	The books are in care of ► THOMAS M. EVANS, JR. Telephone no. ► 307-733-1334 Located at ► 6805 W. TRAIL CREEK COUNTY RD, BX 259, WILSON, WY ZIP+4 ► 83014			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year 15 N/A			
16	At any time during calendar year 2014, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114, (formerly TD F 90-22.1). If "Yes," enter the name of the foreign country ►	16	Yes	No X

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here	N/A	1b
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2014?		1c X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? If "Yes," list the years ►	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	N/A	2b
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ►		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If "Yes," did it have excess business holdings in 2014 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2014.)	N/A	3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2014?		4b X

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

5a During the year did the foundation pay or incur any amount to:

- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No
- (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No
- (3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions) ☐ Yes ☒ No
- (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

▶ ☐

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

N/A

☐ Yes ☐ No

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

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

☐ Yes ☒ No

6b

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

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

☐ Yes ☒ No

7b

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
THOMAS M. EVANS, JR. 6805 W. TRAIL CREEK COUNTY RD WILSON, WY 83014	TRUSTEE 0.00	0.	0.	0.
TANIA G. EVANS 6805 W. TRAIL CREEK COUNTY RD WILSON, WY 83014	TRUSTEE 0.00	0.	0.	0.

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

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

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

0

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	1,596,397.
b	Average of monthly cash balances	1b	14,951.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	1,611,348.
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	1,611,348.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	24,170.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,587,178.
6	Minimum investment return. Enter 5% of line 5	6	79,359.

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	79,359.
2a	Tax on investment income for 2014 from Part VI, line 5	2a	743.
b	Income tax for 2014. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	743.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	78,616.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	78,616.
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	78,616.

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	83,859.
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	83,859.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	83,859.

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				78,616.
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only			69,636.	
b Total for prior years:		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: ► \$ 83,859.				
a Applied to 2013, but not more than line 2a			69,636.	
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				14,223.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:	0.			
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 instr.			0.	
f Undistributed income for 2014. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2015				64,393.
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	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				

N/A

- b**
- Check box to indicate whether the foundation is a private operating foundation described in section

☐ 4942(i)(3) or ☐ 4942(i)(5)

- Subtract line 2d from line 2c

- (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**

[illegible]

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).)

NONE

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

NONE

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

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

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

- 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	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
BONEFISH & TARPON UNLIMITED	N/A	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	20,000.
COMMUNITY FUND OF JACKSON HOLE 180 CENTER STREET, BOX 574 JACKSON, WY 83001	N/A	PUBLIC CHARITY	OLD BILL'S FUN RUN	25,000.
EAGLEBROOK SCHOOL DEERFIELD, MA 01342	N/A	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	5,000.
GUIDES TRUST FOUNDATION P.O. BOX 88 ISLAMORDA, FL 33036	N/A	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	10,000.
INTERNATIONAL GAME FISH ASSOCIATION 300 GULF STREAM WAY DANIA BEACH FL	N/A	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	8,333.
Total			SEE CONTINUATION SHEET(S)	83,859.
b Approved for future payment				
NONE				
Total				0.

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	APPLE INC 1 SH	P	04/13/13	01/29/14
b	AVENUE CR STRAT FD 6,706.355 SH	P	VARIOUS	10/10/14
c	CELLEX THERAPEUTICS INC 500 SH	P	02/13/14	12/10/14
d	DEVON ENERGY CORP 750 SH	P	06/10/14	09/11/14
e	DOW CHEMICAL 650 SH	P	12/10/13	10/09/14
f	DUNKIN BRANDS GROUP INC 750 SH	P	VARIOUS	12/19/14
g	GENERAL MOTORS CO 1,000 SH	P	05/28/14	10/02/14
h	GILEAD SCIENCES INC 98 SH	P	08/28/14	11/13/14
i	KOHL'S CORP 500 SH	P	02/11/13	01/22/14
j	MICRON TECHNOLOGY INC 550 SH	P	02/05/14	03/28/14
k	SANDALWOOD OPPORTUNITY FD 7,187.855 SH	P	VARIOUS	12/09/14
l	PIMCO INC FD CLASS A 11,773.940 SH	P	04/30/13	02/12/14
m	POWERSHARES QQQ TRUST ETF 125 SH	P	10/22/14	12/12/14
n	GUGGENHEIM S&P FD 1,000 SH	P	12/06/13	02/03/14
o	SPDR METALS & MINING ETF 625 SH	P	01/02/14	02/03/14

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 502.		425.	77.
b 76,050.		77,276.	<1,226.>
c 9,404.		13,599.	<4,195.>
d 52,702.		56,618.	<3,916.>
e 31,801.		27,189.	4,612.
f 31,522.		37,175.	<5,653.>
g 33,099.		34,426.	<1,327.>
h 10,204.		10,549.	<345.>
i 25,500.		23,050.	2,450.
j 12,237.		12,832.	<595.>
k 75,688.		76,562.	<874.>
l 145,879.		150,000.	<4,121.>
m 12,928.		12,147.	781.
n 68,929.		69,541.	<612.>
o 24,343.		26,535.	<2,192.>

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			77.
b			<1,226.>
c			<4,195.>
d			<3,916.>
e			4,612.
f			<5,653.>
g			<1,327.>
h			<345.>
i			2,450.
j			<595.>
k			<874.>
l			<4,121.>
m			781.
n			<612.>
o			<2,192.>

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

2

3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):

If gain, also enter in Part I, line 8, column (c).

If (loss), enter "-0-" in Part I, line 8

3

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	SANCHEZ ENERGY CORP 1,000 SH	P	VARIOUS	03/12/14
b	TOLL BROTHERS INC 975 SH	P	VARIOUS	07/25/14
c	TRINITY INDUSTRIES INC 800 SH	P	VARIOUS	VARIOUS
d	TWITTER INC 600 SH	P	09/11/14	12/09/14
e	UNITED RENTALS INC 200 SH	P	03/19/13	01/23/14
f	ACTAVIS PLC 300 SH	P	VARIOUS	VARIOUS
g	WEATHERFORD INTL PLC 2,250 SH	P	VARIOUS	VARIOUS
h	MALLINCKRODT PUB LTD CO 500 SH	P	10/23/14	11/13/14
i	ISHARES SILVER TRUST 2,000 SH	P	08/28/14	09/26/14
j	BLACKROCK STRAT INC FD 2,123.552 SH	P	02/27/13	07/17/14
k	CHEVRON CORP 145 SH	P	04/03/13	10/09/14
l	CHICAGO BRIDGE & IRON CO 600 SH	P	VARIOUS	10/09/14
m	ISHARES U.S. REG BANKS ETF 1,000 SH	P	07/01/13	08/28/14
n	UNITED RENTALS INC 240 SH	P	VARIOUS	10/09/14
o	APPLE INC 9 SH	P	11/19/09	01/29/14

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 26,999.		31,818.	<4,819.>
b 33,481.		35,955.	<2,474.>
c 31,905.		22,650.	9,255.
d 21,137.		31,824.	<10,687.>
e 16,460.		10,855.	5,605.
f 62,595.		43,200.	19,395.
g 27,067.		36,905.	<9,838.>
h 43,878.		44,625.	<747.>
i 33,579.		37,556.	<3,977.>
j 22,000.		21,575.	425.
k 16,729.		17,227.	<498.>
l 31,522.		38,446.	<6,924.>
m 33,483.		29,774.	3,709.
n 24,453.		13,337.	11,116.
o 4,521.		1,802.	2,719.

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			<4,819.>
b			<2,474.>
c			9,255.
d			<10,687.>
e			5,605.
f			19,395.
g			<9,838.>
h			<747.>
i			<3,977.>
j			425.
k			<498.>
l			<6,924.>
m			3,709.
n			11,116.
o			2,719.

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

2

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

3

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	CHEVRON CORP 55 SH	P	VARIOUS	10/09/14
b	MCDONALDS CORP 40 SH	P	11/19/09	02/18/14
c	MICROSOFT CORP 2.95% BOND	P	10/30/09	06/01/14
d	NEXTERA ENERGY INC 59 SH	P	VARIOUS	09/15/14
e	CONSUMERS STAPLES SECTOR TR 39 SH	P	04/24/12	02/18/14
f	3M CO 39 SH	P	VARIOUS	08/06/14
g	US BANCORP DEL 105 SH	P	01/28/10	08/18/14
h	UNITED PARCEL SERV INC 3.875 BOND	P	10/30/09	04/01/14
i	UNITED TECHNOLOGIES CORP 25 SH	P	11/19/09	08/28/14
j	WELLS FARGO & CO 95 SH	P	11/19/09	08/28/14
k	ISHARES SILVER TRUST	P	VARIOUS	12/31/14
l	SPDR GOLD TRUST	P	VARIOUS	12/11/14
m	CAPITAL GAINS DIVIDENDS			
n				
o				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	6,345.		4,628.	1,717.
b	3,856.		2,527.	1,329.
c	25,000.		25,459.	<459.>
d	5,531.		3,970.	1,561.
e	1,622.		1,320.	302.
f	5,445.		3,102.	2,343.
g	4,378.		2,642.	1,736.
h	25,000.		26,389.	<1,389.>
i	2,728.		1,691.	1,037.
j	4,861.		2,689.	2,172.
k	47.		47.	0.
l	147.		147.	0.
m	3,951.			3,951.
n				
o				

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			1,717.
b			1,329.
c			<459.>
d			1,561.
e			302.
f			2,343.
g			1,736.
h			<1,389.>
i			1,037.
j			2,172.
k			0.
l			0.
m			3,951.
n			
o			

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 }	2	9,424.
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8	3	N/A

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

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
METROPOLITAN MUSEUM OF ART 5TH AVENUE & 82ND STREET NEW YORK, NY 10001	N/A	PUBLIC CHARITY	GENERAL CHARITABLE PURPOSES	9,026.
VERMONT SYMPHONY ORCHESTRA 2 CHURCH STREET SUITE 19 BURLINGTON, VT 05401	N/A	PUBLIC CHARITY	HOLIDAY CONCERT	6,500.
Total from continuation sheets				15,526.

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

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
BANK OF JACKSON HOLE	3.	3.	
TOTAL TO PART I, LINE 3	3.	3.	

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
UBS FINANCIAL SERVICES	40,626.	3,951.	36,675.	36,675.	
TO PART I, LINE 4	40,626.	3,951.	36,675.	36,675.	

FORM 990-PF ACCOUNTING FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
K&L GATES LLP	4,489.	0.		0.
TO FORM 990-PF, PG 1, LN 16B	4,489.	0.		0.

FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
UBS FINANCIAL SERVICES	17,664.	8,832.		0.
TO FORM 990-PF, PG 1, LN 16C	17,664.	8,832.		0.

FORM 990-PF	TAXES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES W/H	99.	99.		0.
EXCISE TAX	1,196.	0.		0.
TO FORM 990-PF, PG 1, LN 18	1,295.	99.		0.

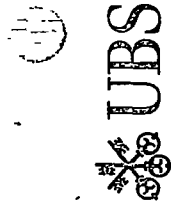
FORM 990-PF	CORPORATE STOCK	STATEMENT	6
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
EQUITIES-DETAIL ATTACHED	1,125,664.	1,402,251.
TOTAL TO FORM 990-PF, PART II, LINE 10B	1,125,664.	1,402,251.

FORM 990-PF	EXPLANATION CONCERNING PART VII-A, LINE 8B	STATEMENT	7
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EXPLANATION

NOT REQUIRED BY STATE OF WYOMING



Portfolio Management Program
December 2014

Account name: THE THOMAS M. EVANS, JR
Friendly account name: Tom PMP
Account number: [REDACTED]

Your Financial Advisor:
MALIN/CONOVER
617-439-8000/800-225-2374

Your assets

Some prices, income and current values shown may be approximate. As a result, gains and losses may not be accurately reflected. See *Important information about your statement* at the end of this document for more information.

Cash

Cash and money balances

Cash and money balances may include available cash balances, UBS Bank USA deposit account balances, UBS AG Stamford Branch deposit account balances and money market mutual fund sweep balances.

UBS Bank USA deposit account balances are insured by the FDIC within applicable limits, but are not protected by SIPC. UBS AG Stamford Branch deposit account balances are not insured by FDIC and are not protected by SIPC. Money market sweep balances are protected by SIPC but are not insured by the FDIC. See the *Important information about your statement* at the end of this document for details about those balances.

Holding	Opening balance on Dec 1 (\$)	Closing balance on Dec 31 (\$)	Price per share on Dec 31 (\$)	Average rate	Dividend/Interest period	Days in period	Cap amount (\$)
UBS BANK USA BUS ACCT	21,435.94	173,169.52					500,000.00

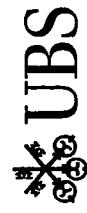
Equities

Common stock

Holding	Trade date	Number of shares	Purchase price/Average price per share (\$)	Cost basis (\$)	Price per share on Dec 31 (\$)	Value on Dec 31 (\$)	Unrealized gain or loss (\$)	Holding period
ABBVIE INC COM								
Symbol: ABBV Exchange: NYSE								
EAI: \$1,960 Current yield: 3.00%	Apr 24, 12	28,000	31.615	885.23	65.440	1,832.32	947.09	LT
	Jul 16, 12	35,000	34.112	1,193.95	65.440	2,290.40	1,096.45	LT
	Apr 1, 13	937,000	40.727	38,161.29	65.440	61,317.28	23,155.99	LT
Security total		1,000,000	40.240	40,240.47		65,440.00	25,199.53	
ACE LTD CHF								
Symbol: ACE Exchange: NYSE								
EAI: \$455 Current yield: 2.26%	Feb 20, 13	175,000	87.322	15,281.52	114.880	20,104.00	4,822.48	LT
CHF Exchange rate 0.99365								
AKORN INC								
Symbol: AKRX Exchange: OTC								
	Oct 22, 14	1,050,000	41.930	44,026.50	36.200	38,010.00	-6,016.50	ST

continued next page





Your assets • Equities • Common stock (continued)

Holding	Trade date	Number of shares	Purchase price/ Average price per share (\$)	Cost basis (\$)	Price per share on Dec 31 (\$)	Value on Dec 31 (\$)	Unrealized gain or loss (\$)	Holding period
AMERICAN AIRL GROUP INC								
Symbol: AAL Exchange OTC								
EAI: \$400 Current yield: 0.75%	Apr 10, 14	525 000	35 330	18,548.25	53 630	28,155 75	9,607.50	ST
	May 1, 14	475 000	36 330	17,256 75	53 630	25,474 25	8,217.50	ST
Security total		1,000 000	35 805	35,805 00		53,630.00	17,825 00	
AMGEN INC								
Symbol: AMGN Exchange OTC								
EAI: \$632 Current yield: 1.98%	Feb 28, 13	200.000	92 887	18,577.48	159 290	31,858 00	13,280 52	LT
APPLE INC								
Symbol: AAPL Exchange OTC								
EAI: \$487 Current yield: 1.70%	Apr 29, 13	259 000	60 784	15,743 13	110 380	28,588 42	12,845 29	LT
APPLIED MATERIALS INC								
Symbol: AMAT Exchange OTC								
EAI: \$600 Current yield: 1.61%	Dec 27, 13	1,500 000	17 397	26,096 88	24 920	37,380 00	11,283 12	LT
BLACKSTONE MTG TR INC REIT								
Symbol: BXMT Exchange: NYSE								
EAI: \$4,160 Current yield: 7.14%	Dec 19, 13	975 000	27 297	26,615 06	29 140	28,411 50	1,796.44	LT
	Jan 31, 14	275 000	28 050	7,713 75	29 140	8,013 50	299 75	ST
	Feb 12, 14	750.000	28.033	21,025 28	29 140	21,855 00	829.72	ST
Security total		2,000 000	27 677	55,354.09		58,280 00	2,925 91	
CALIFORNIA RESOURCES CORP								
Symbol: CRC Exchange NYSE	Nov 13, 14	20 000	7.530	150 60	5.510	110.20	-40.40	ST
CELLEX THERAPEUTICS INC								
Symbol: CLDX Exchange: OTC	Feb 18, 14	500 000	28 016	14,008 00	18 250	9,125 00	-4,883 00	ST
FORTINET INC								
Symbol: FTNT Exchange OTC	Oct 24, 14	1,250 000	25 747	32,183 75	30 660	38,325 00	6,141 25	ST
GILEAD SCIENCES INC								
Symbol: GILD Exchange OTC	Nov 19, 09	60 000	11 584	695 08	94 260	5,655 60	4,960 52	LT
	Apr 24, 12	42 000	13.067	548 83	94 260	3,958 92	3,410 09	LT
Security total		102 000	12 195	1,243 91		9,614 52	8,370.61	
GOOGLE INC CL A								
Symbol: GOOGL Exchange OTC	Apr 24, 12	4 000	301 900	1,207 60	530.660	2,122 64	915 04	LT
	Jul 16, 12	4 000	288 052	1,152 21	530 660	2,122 64	970 43	LT
	Aug 18, 14	42 000	594.230	24,957 66	530.660	22,287 72	-2,669 94	ST

continued next page



Portfolio Management Program
December 2014



Account name: THE THOMAS M EVANS, JR
Friendly account name: Tom PMP
Account number: [REDACTED]

Your Financial Advisor:
MALIN/CONOVER
617-439-8000/800-225-2374

Your assets • Equities • Common stock (continued)

Holding	Trade date	Number of shares	Purchase price/ Average price per share (\$)	Cost basis (\$)	Price per share on Dec 31 (\$)	Value on Dec 31 (\$)	Unrealized gain or loss (\$)	Holding period
Security total		50,000	546.349	27,317.47		26,533.00	-784.47	
GOOGLE INC CL C								
Symbol: GOOG Exchange: OTC	Apr 24, 12	4,000	300.970	1,203.88	526.400	2,105.60	901.72	LT
	Jul 16, 12	4,000	287.165	1,148.66	526.400	2,105.60	956.94	LT
Security total		8,000	294.068	2,352.54		4,211.20	1,858.66	
HOME DEPOT INC								
Symbol: HD Exchange: NYSE								
EAI: \$113 Current yield: 1.79%	Nov 19, 09	60,000	26.969	1,618.14	104.970	6,298.20	4,680.06	LT
INTEL CORP								
Symbol: INTC Exchange: OTC								
EAI: \$2,700 Current yield: 2.48%	Nov 19, 09	90,000	19.229	1,730.62	36.290	3,266.10	1,535.48	LT
	Apr 10, 13	1,910,000	21.856	41,744.96	36.290	69,313.90	27,568.94	LT
	Sep 9, 13	1,000,000	22.986	22,986.20	36.290	36,290.00	13,303.80	LT
Security total		3,000,000	22.154	66,461.78		108,870.00	42,408.22	
JOHNSON & JOHNSON COM								
Symbol: JNJ Exchange: NYSE								
EAI: \$1,680 Current yield: 2.68%	Feb 14, 13	600,000	75.906	45,543.90	104.570	62,742.00	17,198.10	LT
KANSAS CITY STHN NEW								
Symbol: KSU Exchange: NYSE								
EAI: \$224 Current yield: 0.92%	Oct 15, 14	200,000	113.757	22,751.50	122.030	24,406.00	1,654.50	ST
MERCCK & CO INC NEW COM								
Symbol: MRK Exchange: NYSE								
EAI: \$1,800 Current yield: 3.17%	Apr 1, 13	1,000,000	44.267	44,267.44	56.790	56,790.00	12,522.56	LT
MICROSOFT CORP								
Symbol: MSFT Exchange: OTC								
EAI: \$3,100 Current yield: 2.67%	Oct 23, 09	120,000	26.160	3,139.28	46.450	5,574.00	2,434.72	LT
	Apr 24, 12	46,000	31.950	1,469.70	46.450	2,136.70	667.00	LT
	Apr 1, 13	2,334,000	28.527	66,582.02	46.450	108,414.30	41,832.28	LT
Security total		2,500,000	28.476	71,191.00		116,125.00	44,934.00	
MONSTER BEVERAGE CORP COM								
Symbol: MNST Exchange: OTC								
	Oct 8, 14	450,000	95.780	43,101.23	108.350	48,757.50	5,656.27	ST
	Dec 9, 14	100,000	105.805	10,580.55	108.350	10,835.00	254.45	ST
Security total		550,000	97.603	53,681.78		59,592.50	5,910.72	

continued next page





Your assets • Equities • Common stock (continued)

Holding	Trade date	Number of shares	Purchase price/ Average price per share (\$)	Cost basis (\$)	Price per share on Dec 31 (\$)	Value on Dec 31 (\$)	Unrealized gain or loss (\$)	Holding period
OCCIDENTAL PETROLEUM CRP								
Symbol: OXY	Exchange: NYSE							
EAI: \$144	Current yield: 3.57%							
UNTD RENTALS INC								
Symbol: URI	Exchange: NYSE	50,000	83.418	4,170.90	80.610	4,030.50	-140.40	ST
Trade date: Nov 13, 14								
VERTEX PHARMACEUTICAL INC								
Symbol: VRTX	Exchange: OTC	60,000	56.500	3,390.00	102.010	6,120.60	2,730.60	LT
Trade date: Sep 9, 13		250,000	57.980	14,495.00	102.010	25,502.50	11,007.50	LT
Trade date: Nov 15, 13		250,000	68.109	17,027.48	102.010	25,502.50	8,475.02	LT
Security total		560,000	62.344	34,912.48		57,125.60	22,213.12	
Total								
				\$698,790.24	118.800	29,700.00	3,890.02	ST
Total estimated annual income:				\$18,455		\$946,889.14	\$248,098.90	

Closed end funds & Exchange traded products

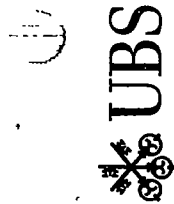
Total/reinvested is the total of all reinvested dividends. It does not include any cash dividends. It is not a tax lot for the purposes of determining holding periods or cost basis. The shares you receive each time you reinvest dividends become a separate tax lot.

Cost basis is the total purchase cost of the security, including reinvested dividends. The cost basis may need to be adjusted for return of capital payments in order to determine the adjusted cost basis for tax reporting purposes.

Unrealized (tax) gain or loss is the difference between the current value and the cost basis and would generally be your taxable gain or loss if the security was sold on this date. The unrealized (tax) gain or loss may need to be adjusted for return of capital payments in order to determine the realized gain or loss for tax reporting purposes.

Investment return is the current value minus the amount you invested. It does not include shares that are not reflected on your statement, including shares that have been realized as either a gain or a loss. It also does not include cash dividends that were not reinvested.

Holding	Number of shares	Purchase price/ Average price per share (\$)	Client investment (\$)	Cost basis (\$)	Price per share on Dec 31 (\$)	Value on Dec 31 (\$)	Unrealized (tax) gain or loss (\$)	Investment return (\$)	Holding period
POWERSHARES QQQ TRUST ETF									
SER 1									
Symbol: QQQ									
Trade date: Oct 22, 14	125,000	97.176	12,147.10	12,147.10	103.250	12,906.25	759.15	759.15	ST
EAI: \$135	Current yield: 1.05%								
WISDOMTREE TRUST MIDCAP DIVID FUND									
Symbol: DON									
Trade date: Feb 27, 13	300,000	62.219	18,665.84	18,665.84	83.740	25,122.00	6,456.16	6,456.16	LT
EAI: \$643	Current yield: 2.56%								
Total				\$30,812.94	\$30,812.94	\$38,028.25	\$7,215.31	\$7,215.31	
Total estimated annual income:				\$778					



Portfolio Management Program
December 2014

Account name: THE THOMAS M EVANS, JR
Friendly account name: Tom PMP
Account number: [REDACTED]

Your Financial Advisor:
MALIN/CONOVER
617-439-8000/800-225-2374

Your assets • **Equities** (continued)

Mutual funds

Total reinvested is the total of all reinvested dividends. It does not include any cash dividends. It is not a tax lot for the purposes of determining holding periods or cost basis. The shares you receive each time you reinvest dividends become a separate tax lot.

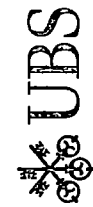
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Holding	Number of shares	Purchase price/ Average price per share (\$)	Client investment (\$)	Cost basis (\$)	Price per share on Dec 31 (\$)	Value on Dec 31 (\$)	Unrealized (tax) gain or loss (\$)	Investment return (\$)	Holding period
AMER FUNDS EUROPACIFIC									
GROWTH FUND									
CLASS F2									
Symbol: AEPFX									
Trade date: Jul 16, 12	985,299	36.609	36,071.79	36,071.79	47.020	46,328.75	10,256.96	10,256.96	LT
EAI: \$777 Current yield: 1.68%									
PRINCIPAL MIDCAP FUND									
CLASS I									
Symbol: PCBIX									
Trade date: Jul 16, 12	3,323,719	14.680	48,792.20	48,792.20	21.910	72,822.68	24,030.48	24,030.48	LT
EAI: \$259 Current yield: 0.36%									
Total			\$84,863.99	\$84,863.99		\$119,151.43	\$34,287.44	\$34,287.44	
Total estimated annual income: \$1,036									





Your assets (continued)

Fixed income

Mutual funds

Total/reinvested is the total of all reinvested dividends. It does not include any cash dividends. It is not a tax lot for the purposes of determining holding periods or cost basis. The shares you receive each time you reinvest dividends become a separate tax lot.

Cost basis is the total purchase cost of the security, including reinvested dividends. The cost basis may need to be adjusted for return of capital payments in order to determine the adjusted cost basis for tax reporting purposes.

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Holding	Number of shares	Purchase price/ Average price per share (\$)	Client investment (\$)	Cost basis (\$)	Price per share on Dec 31 (\$)	Value on Dec 31 (\$)	Unrealized (tax) gain or loss (\$)	Investment return (\$)	Holding period
BLACKROCK STRATEGIC INCOME I									
Symbol: BSJIX									
Trade date: Feb 27, 13	12,640,228	10.159	128,424.71	128,424.71	10.110	127,792.71	-632.00		LT
Total reinvested	71,083	10.198	724.95	724.95	10.110	718.65	-6.30		
EAI: \$3,114 Current yield: 2.42%									
Security total	12,711,311	10.160	129,149.66	129,149.66		128,511.35	-638.30	86.65	
PIMCO INCOME FUND CLASS P									
Symbol: PONPX									
Trade date: Oct 30, 14	5,055,292	12.660	64,000.00	64,000.00	12.330	62,331.75	-1,668.25	-1,668.25	ST
EAI: \$3,316 Current yield: 5.32%									
Total			\$192,424.71	\$193,149.66		\$190,843.10	-\$2,306.55	-\$1,581.61	
Total estimated annual income: \$6,430									



Portfolio Management Program December 2014

Account name: THE THOMAS M. EVANS, JR.
Friendly account name: Tom PMP
Account number: [REDACTED]

Your Financial Advisor:
MALIN/CONOVER
617-439-8000/800-225-2374

Your assets (continued)

Commodities

Closed end funds & Exchange traded products

Total reinvested is the total of all reinvested dividends. It does not include any cash dividends. It is not a tax lot for the purposes of determining holding periods or cost basis. The shares you receive each time you reinvest dividends become a separate tax lot.

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Investment return is the current value minus the amount you invested. It does not include shares that are not reflected on your statement, including shares that have been realized as either a gain or a loss. It also does not include cash dividends that were not reinvested.

Holding	Number of shares	Purchase price/Average price per share (\$)	Client investment (\$)	Cost basis (\$)	Price per share on Dec 31 (\$)	Value on Dec 31 (\$)	Unrealized (tax) gain or loss (\$)	Investment return (\$)	Holding period
ISHARES SILVER TRUST									
Symbol: SLV									
Trade date: Nov 21, 14	2,500,000	15.800	39,500.00	39,500.00	15.060	37,650.00	-1,850.00	-1,850.00	ST
SPDR GOLD TRUST									
Symbol: GLD									
Trade date: Jun 19, 14	600,000	126.269	75,761.94	75,761.94	113.580	68,148.00	-7,613.94	-7,613.94	ST
Total			\$115,261.94	\$115,261.94		\$105,798.00	-\$9,463.94	-\$9,463.94	

Your total assets

Cash	Cash and money balances	Value on Dec 31 (\$)	Percentage of your account	Cost basis (\$)	Estimated annual income (\$)	Unrealized gain or loss (\$)
Equities	Common stock	946,889.14		698,790.24	18,455.00	248,098.90
	Closed end funds & Exchange traded products	38,028.25		30,812.94	778.00	7,215.31
	Mutual funds	119,151.43		84,863.99	1,036.00	34,287.44
Total equities		1,104,068.82	70.15%	814,467.17	20,269.00	289,601.65
Fixed income	Mutual funds	190,843.10	12.13%	193,149.66	6,430.00	-2,306.55
Commodities	Closed end funds & Exchange traded products	105,798.00	6.72%	115,261.94		-9,463.94
Total		\$1,573,879.44	100.00%	\$1,296,048.29	\$26,699.00	\$277,831.16

