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, 990-PF

Return of Private Foundation

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

OMB No 1545-0052

2014

Open to Public Inspection

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.

For	calenda	ar year 2014 or tax year beginning , a	and ending				
Na	me of four	ndation			A Emplo	yer identification number	
_						1422010	
		-BYER FOUNDATION				1433019	
		street (or P O box number if mail is not delivered to street address) ROLLMAN ESTATES DR	Ro	oom/suite		one number (see instructions 3 – 984 – 9775	5)
_		state or province, country, and ZIP or foreign postal code	l		713	1-304-3113	
	•	INNATI OH 45236			C If exem	iption application is pending,	check here
			n of a former public cl	narity	D 1 For	eign organizations, check he	re 🕨 📗
•	Oncon a	Final return Amended	•			eign organizations meeting t	<u></u>
		Address change Name cha				% test, check here and attach	
	Ob						
		ype of organization X Section 501(c)(3) exempt private	e private foundation		1	te foundation status was tem i 507(b)(1)(A), check here	►
		Y A Z		ruol	1		
		ket value of all assets at J Accounting method Other (appart)	A Cash Acc	rual	1	oundation is in a 60-month te section 507(b)(1)(B), check h	
	-	ear (from Part II, col. (c), Under (specify) \$ 1,605,894 (Part I, column (d) must	ha an anah hansa \				
	ne 16)				1		(d) Disbursements
۲	art i	Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal	(a) Revenue and expenses per	(b) Net in		(c) Adjusted net income	for charitable purposes
		the amounts in column (a) (see instructions))	books	"100		"IOOTTO	(cash basis only)
	1	Contributions, gifts, grants, etc., received (attach schedule)					
	2	Check ► X if the foundation is not required to attach Sch B		ļ			
	3	Interest on savings and temporary cash investments	1		1		
	4	Dividends and interest from securities	35,391		35,391		
	5a	Gross rents					
Φ	b	Net rental income or (loss)					
2	€ 6a	Net gain or (loss) from sale of assets not on line 10	41,204				
Š	b	Gross sales price for all assets on line 6a 82,776					
2	7	Capital gain net income (from Part IV, line 2)			41,204		
Sept a Revenue	বু ৪	Net short-term capital gain				0	
آگي	9 ا	Income modifications					
	10a	Gross sales less returns and allowances		ļ			
V 83	b c	Less Cost of goods sold					
	"	Gross profit or (loss) (attach schedule)	· · · · · · · · · · · · · · · · · · ·			****	
	11	Other income (attach schedule)	76,596		76,596	0	
_	[⇒] 12	Total. Add lines 1 through 11	76,396	+	70,390	U	
Š	_§13	Compensation of officers directors trustees, etc	0		·		
xpenses.	ئ]314 مدا	Other employee salaries and wages Pension plans, employee benefits Legal fees attach schedule) 2016					
pe	15 16a	Pension plans, employee benefits Legal fees attach/schedule) 2016					
Ĕ	loa h	Accounting tees (attach schedule)		 			
Ve	b	Other professional fees (attach-schedule) Stmt 1	4,873	 	4,873		<u> </u>
ati	17	Other professional fees (attach-schedole) T Stmt 1 Interest OGDEN,	2,373	 	<u> </u>		
Operating and Administrative E	18	Taxes (attach schedule) (see instructions) Stmt 2	2,188		549		1
Ē	19	Depreciation (attach schedule) and depletion		1	. <u>.</u>		
퉏	20	Occupancy					
Ă	21	Travel, conferences, and meetings					
pu	22	Printing and publications					
a	23	Other expenses (att sch) Stmt 3	1,364		573		
ţį	24	Total operating and administrative expenses.					
Ę.	:	Add lines 13 through 23	8,425		5,995	O	
) De	25	Contributions, gifts, grants paid	75,000	T			75,000
_	26	Total expenses and disbursements. Add lines 24 and 25	83,425	5	5,995	0	75,000
	27	Subtract line 26 from line 12					
	a	Excess of revenue over expenses and disbursements	-6,829	9			
	b	Net investment income (if negative, enter -0-)		 	70,601		
	l c	Adjusted net income (if negative, enter -0-)		1		C) [

Cash - non-interest beams Gif ser Mater Value Gif ser Mater Value Gif ser Mater Value Cash - non-interest beams Gif ser Mater Value Gif ser	Part I	Balance Sheets Attached schedules and amounts in the description colur		Beginning of year	End o	f year					
2 Savangs and temporary cash investments 3 Accounts receivable ► Less allowance for doubtful accounts ► 4 Pledgas receivable ► Less allowance for doubtful accounts ► 5 Grants receivable E Less allowance for doubtful accounts ► 6 Receivables due from officers, directors, trustees, and other disqualified persons (atlants schedule) (see instructions) 7 Other axes are been removable (its schedule) Less allowance for doubtful accounts ► 0 Investments – Use and state government obligations (atlant schedule) b Investments – Use and state government obligations (atlant schedule) b Investments – Corporate bonds (atlant schedule) c Investments – Order (atlant schedule) b Investments – Order (atlant schedule) 11 Investments – Order (atlant schedule) 12 Investments – Order (atlant schedule) 13 Investments – Order (atlant schedule) 14 Less aximated expression (atlant schedule) 15 Total assets (or be completed by all filers – see the instructions Also, see page 1, fem II) 17 Accounts spayable and completed by all filers – see the instructions Also, see page 1, fem II) 18 Total lassets (or be completed by all filers – see the instructions Also, see page 1, fem II) 19 Corporate revenue 10 Deferred revenue 11 Mortgags and other rotes payable (attlets schedule) 12 Other labilities (describe ► 12 Total liabilities (describe ► 13 Defeases not order organis surplus, or land, bldg, and equipment fund 14 Less accompleted into 27 through 22) 15 Foundations that follows FAS 117, check here and complete lines 27 through 31 and control or complete lines 27 through 32 and allowance (see manutotions) 10 Total ina sasets or fund balances (see martuctions) 10 Total ina sasets or fund balances (see martuctions) 10 Total ina sasets or fund balances (see martuctions) 10 Total ina sasets or fund balances (see martuctions) 10 Total ina sasets or fund balances (see martuctions) 10 Total ina sasets or fund balances (see martuctions) 11 Total liabilities and net assets or fund balances (see martuctions) 11 Total liabilities and net assets or fund b	rant					(c) Fair Market Value					
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16 Total assets (to be completed by all filers – see the instructions Also, see page 1, item 1) 17 Accounts payable and accrued expenses 18 Grants payable 20 Loans from officers, directors, trustees, and other disqualified persons 21 Mortgages and other notes payable (attach schedule) 22 Other liabilities (add lines 17 through 22) 31 Total liabilities (add lines 17 through 22) 42 Unrestricted 43 Temporarily restricted 45 Temporarily restricted 46 Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. 27 Capital stock, trust principal, or current funds 28 Paid-in or capital surplus, or land, bidg, and equipment fund 29 Retained earnings, accumulated income, endowment, or other funds 31 Total liabilities and net assets fund balances (see instructions) 29 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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) 7 Total net assets or included in line 2 (itemize) 7 Total net assets or included in line 2 (itemize) 7 Total net assets or included in line 2 (itemize) 8 Total inabilities (included in line 2 (itemize) 9 Total inabilities (included in line 2 (it	15)								
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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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) ▶ 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ▶ 5	ž 31	Total liabilities and net assets/fund balances (see									
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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) ▶ 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ▶ 5	-	instructions)		1,250,285	1,243,456						
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2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) ▶ 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ▶ 5	1 Tota	net assets or fund balances at beginning of year - Part II, column (a), li	ne 30 (mu	ust agree with							
2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) ▶ 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ▶ 5					_1	1,250,285					
4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ► 5			2	-6,829							
5 Decreases not included in line 2 (itemize) ▶ 5	3 Othe	r increases not included in line 2 (itemize) ▶			3						
booleases not metasse in mile 2 (normal)	4 Add	lines 1, 2, and 3			4	1,243,456					
	5 Deci	eases not included in line 2 (itemize)		•	5						
	6 Tota	net assets or fund balances at end of year (line 4 minus line 5) - Part II	, column ((b), line 30	_6	1,243,456					

Part IV Capital Gains a	nd Losses for Tax on Investm	ent Income				1 age o
(a) List and desc	cribe the kind(s) of property sold (e.g., real estate, arehouse, or common stock, 200 shs MLC Co.)		(b) How acquired P – Purchase D – Donation	(c) Date ac (mo , day		(d) Date sold (mo , day, yr)
1a See Worksheet						
b		-				
<u>c</u>				ļ <u></u>		
<u>d</u>						
е		T				
(e) Gross sales price	(f) Depreciation allowed (or allowable)		st or other basis expense of sale		(h) Gain (e) plus (f)	
<u>a</u>						
<u>b</u>			_			· · · · · · · · · · · · · · · · · · ·
<u>c</u>			· · · · · · · · · · · · · · · · · · ·	<u> </u>		
<u>d</u>						
Complete only for assets shown	l ig gain in column (h) and owned by the f	Lundation on 12/3	11/69			·
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) E	ccess of col (i)	col ((h) gain minus ess than -0-) or m col (h))
a						· <u></u>
b			<u>-</u>			
С						
_d				ļ		
<u>e</u>		<u>L</u>		ļ		
2 Capital gain net income or (net o	capital loss) If gain, also enter in		•	2		41,204
	ss) as defined in sections 1222(5) and (i s, column (c) (see instructions). If (loss),	_	•			
Part I, line 8				3		
	nder Section 4940(e) for Redu			ome		
(For optional use by domestic private	e foundations subject to the section 4940	(a) tax on net inv	estment income)			
If section 4940(d)(2) applies, leave t	his part blank					
	ction 4942 tax on the distributable amour		ne base period?			Yes X No
	each column for each year, see the inst		aking any entries			
(a)	(b)		(c)			(d)
Base period years Calendar year (or tax year beginning ii	Advented available distribution	Net v	value of noncharitable-use asse	ots		ibution ratio ivided by col (c))
2013		,000	1,535,			0.042329
2012		,000	1,287,			0.049721
2011	64	,000	1,287,			0.049696
2010		,295	1,306,			0.043855
2009		,583	1,155,	539	,	0.062813
						0 249414
2 Total of line 1, column (d)	Consensation and the trackers	han Ohii Eirahii	4L _	2	 	0.248414
	5-year base period – divide the total on has been in existence if less than 5 year	-	tne	3		0.049683
4 Enter the net value of noncharits	able-use assets for 2014 from Part X, line	- 5		4		1,630,165
Cities the fiet value of floridiant	able-use assets for 2014 from Fart X, fills					
5 Multiply line 4 by line 3				5		80,991
6 Enter 1% of net investment inco	me (1% of Part L line 27b)			6		706
7 Add lines 5 and 6				7	-	81,697
8 Enter qualifying distributions from	m Part XII, line 4 an line 7, check the box in Part VI, line 1l	and complete ti	hat nad using a 1% tay	rate. See the	<u> </u>	75,000
Part VI instructions		o, and complete t	pur Joing a 170 tax	. 3.0. 000 1110	-	

Form	990-PF (2014) WOOD-BYER FOUNDATION 31-1433019			<u>P</u> a	ge 4
	rt VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 – see instructions)				
1a					
	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			1,4	12
	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-)				0
3	Add lines 1 and 2			1,4	12
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	\bot			0
5	Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-			1,4	12
6	Credits/Payments				
а	2014 estimated tax payments and 2013 overpayment credited to 2014 6a 1,500				
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 6d				
7	Total credits and payments Add lines 6a through 6d	+		1,5	
8	Enter any penalty for underpayment of estimated tax. Check here X if Form 2220 is attached				<u>15</u>
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	\rightarrow			
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid				73
11	Enter the amount of line 10 to be Credited to 2015 estimated tax ▶ 0 Refunded ▶ 1	<u> </u>			73
Pa	rt VII-A Statements Regarding Activities		· · · · · · · · · · · · · · · · · · ·	Т	
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it			Yes	No
	participate or intervene in any political campaign?		1a		<u> </u>
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see		1	1	v
	Instructions for the definition)?		1b		<u> </u>
	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			Ì	x
С	Did the foundation file Form 1120-POL for this year?		1c		
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year				
	(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		x
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 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of				
3	incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		3		x
	Did the foundation have unrelated business gross income of \$1,000 or more during the year?		4a		X
4a		N/A		-	
b	If "Yes," has it filed a tax return on Form 990-T for this year? Was there a liquidation, termination, dissolution, or substantial contraction during the year?	,	5		x
5	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				
o	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?		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 X	.V	7	Х	
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		8b	X	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or				
-	4942(j)(5) for calendar year 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)? If "Yes,"				
	complete Part XIV		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>
			Form 99	90-PF	(2014)

Form 990-PF (2014)

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<u>• P</u>	art 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?		13	X	
	Website address ► N/A				
14	The books are in care of ▶ ROBERT A WOOD Telephone no ▶	513-9	84-	977	5
	5100 ROLLMAN ESTATES DR				
	Located at ▶ CINCINNATI OH ZIP+4 ▶	45236	j.		
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 – Check here				▶ [
	and enter the amount of tax-exempt interest received or accrued during the year	15			
16	At any time during calendar year 2014, did the foundation have an interest in or a signature or other authority			Yes	No
	over a bank, securities, or other financial account in a foreign country?		16		X
	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		<u> </u>		
P	art 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?	X No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a				
	disqualified person?	X No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes	X No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	X No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for				
	the benefit or use of a disqualified person)?	X No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the	_			
	foundation agreed to make a grant to or to employ the official for a period after				
	termination of government service, if terminating within 90 days) Yes	X No			
b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations	_			
	section 53 4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?	N/A	1b		
	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	_			
	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))				
а	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?	X No			
	If "Yes," list the years ▶ 20 , 20 , 20 , 20	_			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2)				
	(relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to				
	all years listed, answer "No" and attach statement – see instructions)	N/A	2b		
С	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here				
	▶ 20 , 20 , 20 , 20				
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise				
	at any time during the year?	X No			
b	If "Yes," did it have excess business holdings in 2014 as a result of (1) any purchase by the foundation or				
	disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the				
	Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of				
	the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the				
	foundation had excess business holdings in 2014)	N/A	3b	<u> </u>	<u> </u>
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a	<u> </u>	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	<u> </u>	X

om	1 990-PF (2014) WOOD - BYER	FOUNDATION		433019			Page 6
P	art VII-B Statements Rega	rding Activities for Which Fe	orm 4720 May Be R	equired (conti	nued)		
5a	During the year did the foundation pa	ly or incur any amount to					
	(1) Carry on propaganda, or otherwi	se attempt to influence legislation (se	ction 4945(e))?	Y	es X No		
	(2) Influence the outcome of any spe	ecific public election (see section 495	5), or to carry on,				
	directly or indirectly, any voter re	gistration drive?		Y	es X No		
	(3) Provide a grant to an individual f	or travel, study, or other similar purpo	ses?	Y	es X No		
	(4) Provide a grant to an organization	n other than a charitable, etc , organi	zation described in				
	section 4945(d)(4)(A)? (see instr	uctions)		Y	es 🛚 X No		
	(5) Provide for any purpose other th	an religious, charitable, scientific, liter	rary, or educational				
	purposes, or for the prevention of	f cruelty to children or animals?			es X No		
b	If any answer is "Yes" to 5a(1)-(5), d	id any of the transactions fail to qualif	fy under the exceptions de	escribed in	4-		
	Regulations section 53 4945 or in a	current notice regarding disaster assis	stance (see instructions)?		N/A	5b	
	Organizations relying on a current no	itice regarding disaster assistance ch	eck here		▶ []		
C	If the answer is "Yes" to question 5a	4), does the foundation claim exempt	tion from the tax				
	because it maintained expenditure re	sponsibility for the grant?		N/A 🗌 Y	es 📙 No		
	If "Yes," attach the statement require	d by Regulations section 53 4945–5(d)				
6a	Did the foundation, during the year, i	eceive any funds, directly or indirectly	y, to pay premiums		_		
	on a personal benefit contract?				es X No		
b	Did the foundation, during the year, j	pay premiums, directly or indirectly, or	n a personal benefit contr	act?		6b	X
	If "Yes" to 6b, file Form 8870				<u></u>		
7a	At any time during the tax year, was	the foundation a party to a prohibited	tax shelter transaction?	Y	es X No		
	If "Yes," did the foundation receive a				N/A	7b	
Pi		Officers, Directors, Trustees	s, Foundation Mana	agers, Highly	Paid Employe	es,	
	and Contractors						
1 1	List all officers, directors, trustees,	oundation managers and their con	npensation (see instruc	tions).		I	
	(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		ense account, allowances
PI	RISCILLA WOOD-BYER	CINCINNATI	President		i		
	380 CAROLINES TRAIL	ОН 45242	1.00	o	0		0
	DBERT WOOD	CINCINNATI	Treasurer				· ·
	100 ROLLMAN ESTATES DR	ОН 45236	5.00	o	0		0
2	Compensation of five highest-paid "NONE."	l employees (other than those inclu	uded on line 1 – see ins	tructions). If non	e, enter		
	(a) Name and address of each emplo	eyee 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		ense account, allowances
N	ONE						
						-	
_						 	
Cots	al number of other employees hald over	vr \$50 000				_	0

Form 990-PF (2014) WOOD-BYER FOUNDATION	31-1433019	Page 7
Part VIII Information About Officers, Directors, Trustees		mployees,
and Contractors (continued)		
3 Five highest-paid independent contractors for professional services		 -
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
		
Total number of others receiving over \$50,000 for professional services		<u> </u>
Part IX-A Summary of Direct Charitable Activities		
List the foundation's four largest direct charitable activities during the tax year. Include relevant statistics organizations and other beneficiaries served, conferences convened, research papers produced, etc.	al information such as the number of	Expenses
1 N/A		
2		
		
3		
4		
•		
Part IX-B Summary of Program-Related Investments (s	ee instructions)	· · · · · · · · · · · · · · · · · · ·
Describe the two largest program-related investments made by the foundation during the tax year on line	es 1 and 2	Amount
1 N/A		
2		
2		
All other program-related investments. See instructions		
3		
Total. Add lines 1 through 3	<u> </u>	

qualifies for the section 4940(e) reduction of tax in those years

Form	990-PF (2014) WOOD-BYER FOUNDATION 31-1433019		Page 8
	Minimum Investment Return (All domestic foundations must complete this part. Foreig	n fou	
	see instructions)		·
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc.,		
	purposes		
а	Average monthly fair market value of securities	1a	0
b	Average of monthly cash balances	1b	28,464
С	Fair market value of all other assets (see instructions)	1c	1,626,526
d	Total (add lines 1a, b, and c)	1d	1,654,990
е	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation)		
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	1,654,990
4	Cash deemed held for charitable activities Enter 11/2% of line 3 (for greater amount, see		
	instructions)	4	<u>24,825</u>
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	1,630,165
6	Minimum investment return. Enter 5% of line 5	6	81,508
Pa	Irt XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating	found	lations
	and certain foreign organizations check here ▶ and do not complete this part)		
1	Minimum investment return from Part X, line 6	1	81,508
2a	Tax on investment income for 2014 from Part VI, line 5		
b	Income tax for 2014 (This does not include the tax from Part VI)		
С	Add lines 2a and 2b	2c	1,412 80,096
3	Distributable amount before adjustments Subtract line 2c from line 1	3	80 <u>,096</u>
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	80,096
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	80,096
Д,	art XII Qualifying Distributions (see instructions)		
	ark Alt Qualifying Distributions (see instructions)	, ,	
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
а	Expenses, contributions, gifts, etc. – total from Part I, column (d), line 26	1a	75,000
b	Program-related investments – total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc.,		
	purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
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_	75,000
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income		
	Enter 1% of Part I, line 27b (see instructions)	5	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	75,000
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation	ation	

	990-PF (2014) WOOD-BYER FOUNDATION		31-1433019			
`Pa	rt XIII Undistributed Income (see instructions)	_ .				
		(a) Corpus	(b) Years prior to 2013	(c) 2013	(d) 2014	
1	Distributable amount for 2014 from Part XI,		Todas prior to 2010	2010	80,096	
_	line 7				00,030	
2	Undistributed income, if any, as of the end of 2014			72,924		
	Enter amount for 2013 only			,2,321		
	Total for prior years 20, 20, 20					
3	Excess distributions carryover, if any, to 2014					
-	From 2009 From 2010					
_	From 2011					
	From 2012					
	From 2013					
	Total of lines 3a through e					
4	Qualifying distributions for 2014 from Part XII,					
*	line 4 ▶ \$ 75,000					
-	Applied to 2013, but not more than line 2a			72,924		
	Applied to undistributed income of prior years		<u> </u>			
D	(Election required – see instructions)					
_	Treated as distributions out of corpus (Election				·····	
·	required – see instructions)					
d	Applied to 2014 distributable amount				2,076	
	Remaining amount distributed out of corpus					
5	Excess distributions carryover applied to 2014					
•	(If an amount appears in column (d), the same					
	amount must be shown in column (a))					
6	Enter the net total of each column as					
Ū	indicated below:					
а	Corpus Add lines 3f, 4c, and 4e Subtract line 5					
	Prior years' undistributed income Subtract	·····				
	line 4b from line 2b					
С	Enter the amount of prior years' undistributed					
•	income for which a notice of deficiency has					
	been issued, or on which the section 4942(a)					
	tax has been previously assessed					
d	Subtract line 6c from line 6b Taxable					
	amount – see instructions					
е	Undistributed income for 2013 Subtract line	,				
	4a from line 2a Taxable amount – see					
	instructions					
f	Undistributed income for 2014 Subtract lines					
	4d and 5 from line 1. This amount must be					
	distributed in 2015				78,020	
7	Amounts treated as distributions out of corpus					
	to satisfy requirements imposed by section					
	170(b)(1)(F) or 4942(g)(3) (Election may be					
	required—see instructions)					
8	Excess distributions carryover from 2009 not					
	applied on line 5 or line 7 (see instructions)					
9	Excess distributions carryover to 2015.					
	Subtract lines 7 and 8 from line 6a					
10	Analysis of line 9					
а	Excess from 2010					
b	Excess from 2011					
С	Excess from 2012		1			

Excess from 2013 Excess from 2014

DAA

Pε	rt XIV Private Operating For	ındations (see ın	structions and Par	t VII-A, question 9)				
'1a	If the foundation has received a ruling or	determination letter th	at it is a private operat	ting					
	foundation, and the ruling is effective for	2014, enter the date of	of the ruling	>					
b	Check box to indicate whether the foundation	ation is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)							
2a	Enter the lesser of the adjusted net	Tax year		Prior 3 years					
	income from Part I or the minimum	(a) 2014	(b) 2013	(c) 2012	(d) 2011	(e) Total			
	investment return from Part X for								
	each year listed								
b	85% of line 2a								
c	Qualifying distributions from Part XII.		-						
·	line 4 for each year listed								
d	Amounts included in line 2c not used directly	· · · · · · · · · · · · · · · · · · ·							
u	. '								
_	for active conduct of exempt activities								
е	Qualifying distributions made directly								
	for active conduct of exempt activities								
_	Subtract line 2d from line 2c		<u> </u>	·					
3	Complete 3a, b, or c for the								
	alternative test relied upon								
а	"Assets" alternative test – enter								
	(1) Value of all assets		ļ						
	(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								
С	"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				İ				
	section 4942(j)(3)(B)(iii)								
	(3) Largest amount of support from								
	an exempt organization								
	(4) Gross investment income			 -					
P	art XV Supplementary Inform	nation (Complete	this part only if	the foundation h	ad \$5.000 or more	e in assets at			
	any time during the ye								
1	Information Regarding Foundation Ma					· · · · · · · · · · · · · · · · · · ·			
а	List any managers of the foundation who	-	e than 2% of the total	contributions received	by the foundation				
_	before the close of any tax year (but only								
	N/A	,		(, ,				
	List any managers of the foundation who	own 10% or more of	the stock of a corporat	ion (or an equally large	portion of the				
-	ownership of a partnership or other entity		•		•				
	N/A	,							
2	Information Regarding Contribution, C	Frant, Gift, Loan, Sch	nolarship, etc., Progr	ams:					
_	Check here ► X if the foundation only				loes not accept				
	unsolicited requests for funds. If the foun		•						
	other conditions, complete items 2a, b, c	-	ants, etc (see mstruct	ions) to marviduals or t	organizations under				
	The name, address, and telephone numl		of the person to whom	applications should be	addressed				
а		Jei Vi e-maii address i	oi the person to whom	applications should be	- 444163564				
	N/A								
	The form in which analysis as a second to	aubmitted and of	notion and materials th	ov chould radicals:					
b	The form in which applications should be \mathbf{N}/\mathbf{A}	submitted and inform	iation and materials th	ey snould include.					
	Any submission deadlines								
·	N/A								
	Any restrictions or limitations on awards,	such as by geograph	ical areas, charitable fi	elds, kinds of institution	ns. or other				
u	factors	Julia de de geograph	iour divas, chantable li	monder monder					
	N/A								
	,/								

Page 11

Supplementary Information (continued) 3 Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, Recipient Purpose of grant or show any relationship to status of Amount contribution any foundation manager recipient Name and address (home or business) or substantial contributor Paid during the year See Statement 5 75,000 75,000 **▶** 3a Total **b** Approved for future payment N/A ▶ 3b Total

. [Part XVI-A	Analysis of Income-Producing Acti	vities				
		ounts unless otherwise indicated		ed business income	Exclude	d by section 512, 513, or 514	
1	Program sei	vice revenue	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	(e) Related or exempt function income (See instructions)
	=						
	b						
	c						
	d				<u> </u>		
	е						
	f				<u> </u>		
	g Fees an	d contracts from government agencies				·	
2	Membership	dues and assessments					
3	Interest on s	avings and temporary cash investments			_		1
4	Dividends a	nd interest from securities		ļ			35,391
5	Net rental in	come or (loss) from real estate					
		anced property			ļ		
		t-financed property		<u> </u>	ļ		
		come or (loss) from personal property			<u> </u>	_ 	
	Other invest				ļ		
	•	s) from sales of assets other than inventory			 		41,204
		or (loss) from special events		<u> </u>	-		
		or (loss) from sales of inventory			 		
11	Other reven	ue a			 		
					 		
					+		
					 		
4 2	e)	0	76,596
		ld columns (b), (d), and (e) ine 12, columns (b), (d), and (e)		<u> </u>	٠	13	76,596
		in line 13 instructions to verify calculations)					707330
	Part XVI-B	Relationship of Activities to the Ac	complishm	ent of Exempt P	urpose		
	Line No.	Explain below how each activity for which income					
	₩	accomplishment of the foundation's exempt purpo					
	N/A						
_							***
_							
						.	
							
_				 -			
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_	 						
			. 				
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						· · · · · · · · · · · · · · · · · · ·	
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		İ					

Part X	(All	Information Reg Exempt Organiz	_	insters To and	d Transactio	ons and Relation	nships Wit	h Noncharita	ble		
1 Did	the ora:	anization directly or inc		e in any of the foli	lowing with any	other organization de	escribed		\top	Yes	No
	_	01(c) of the Code (oth		=	-	-				100	
	anızatıoı	` '				, , , , , , , , , , , , , , , , , , ,	,				
•		om the reporting found	lation to a no	ncharitable exemi	ot organization o	of					
	Cash	om the topoling round							1a(1)		x
	Other a	ssets							1a(2)		X
	er trans								1.4.27		 -
		of assets to a nonchard	able exempt	organization					16(1)	l i	x
		ses of assets from a n	•	•	on				1b(2)		X
٠,,		of facilities, equipment			511				1b(3)	\vdash	<u> </u>
٠,,		rsement arrangement	•	0.0					1b(4)		X
		or loan guarantees	-						1b(5)		X
		nance of services or m	embership or	fundraising solicit	tations				1b(6)		X
		facilities, equipment, m	•	•					1c		x
	-	er to any of the above	•	•	, ,	mn (b) should alway	s show the fa	ır market			
		goods, other assets,									
valu	ue in any	transaction or sharing	arrangem <u>e</u> n	it, show in column	(d) the value of	f the goods, other as	sets, or service	es received			
(a) Lin		(b) Amount involved	1	of noncharitable exemp		1		nsactions, and sharing	arrangeme	nts	
N/A											
				·		<u> </u>					
				· - · - · -		<u></u>					
						<u> </u>		 			
		ļ				<u> </u>					
		ļ				 		<u> </u>			
						 					
		ļ <u></u>				<u> </u>					
						 					
		 	<u> </u>			 					
<u> </u>		 				 					
des	scribed i Yes," co	dation directly or indire in section 501(c) of the mplete the following so	Code (other t	than section 501(c)(3)) or in section				Y	es X	No
$-\frac{1}{N/2}$		(a) Name of organization	-	(b) Type of c	organization	 	(c) Descript	ion of relationship			
	<u>-</u>					 					
						-					
		 	-		 	 					
											
Т		nalties of perjury, I declare the						ny knowledge and beli	ef, it is tru	θ,	
Sign Here	correct, a	and complete Declaration of	preparer (other ti	han taxpayer) is based	on all information of	which preparer has any k	_	May the IRS di with the prepar (see instruction	er shown b		No
	Sin	nature of officer or trustee				13/14	TRUS	155			
1_	T	ype preparer's name			Presparer's signati	· · · · · · · · · · · · · · · · · · ·	_e\\.	Date		Check self-em	_
Paid	Heid	li T. Heinrich			Heidi T.	Heinrich		AA 05/	12/16	1	PIOYEU
Preparer	Firm's			& Heinri					018		;
Jse Only	/			ton Ln					-147		
			innati,		46-1611		Ì		3-34		
_										ON DE	

(15)

, ,		Capital Gains and Losses	s for Tay on In	vestment In	come	
Form 990-PF		Japitai Gailis allu Lusse:	G IOI TAX OII III	regunent ill		2014
	For calend	dar year 2014, or tax year beginning		, and ending		
Name					Employer Ider	ntification Number
WOOD-BYER E	OUNDA	TION			31-1433	019
		e the kind(s) of property sold, e.g., real estate, rehouse, or common stock, 200 shs. MLC Co		(b) How acquired P-Purchase D-Donation	(C) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
(1) 221.808 I	FA INT	TERM EXTENDED		P	01/07/13	12/22/14
·/		LARGE CAP VALUE		P	01/20/10	12/22/14
		RD INDEX FDS MIDCAP		<u>P</u>	01/21/10	12/22/14
(4) 67.000 VA				P	01/21/10	12/22/14
		RD INDEX FDS REIT		P P	Various	12/22/14
		RD INDEX FDS TOTAL istributions		P	Various	Various_
	tain Di	BCIIDUCIONS				
(8)	-					
(10)				-		
(11)						
(12)						
(13)						
(14)						_
(15)				L		
(e) Gross sales prid	се	(f) Depreciation allowed (or allowable)	(g) Cost or oth plus expense	er basis of sale	(h) Gain (e) plus (f)	or (loss) minus (g)
(1) 2,	360			2,432		-72
	330			4,855		4,475
(3) 12,				5,816		6,324
	034			3,573		3,461
(5) 14,			<u> </u>	8,717		5,589
(6) 30,				16,179		13,955 7,472
<u> </u>	472				 	1,312
(8)						
(10)						
(11)	*6.0					
(12)						
(13)				· · · · · · · · · · · · · · · · · · ·		
(14)						
(15)			1			
Complete only for a	ssets shown	ng gain in column (h) and owned by the	e foundation on 12/31/6		<u>T </u>	
(I) FMV as of 12/31		(j) Adjusted basis as of 12/31/69	(k) Excess over col (j		(I) Gains (Co col (k), but not les Losses (from	
(1)						-72
(2)					ļ	4,475
(3)						6,324 3,461
(4)					-	5,589
(5)					 	13,955
<u>(6)</u> <u>(7)</u>			-		1	7,472
(8)					1	
(9)						
(10)						
(11)						
(12)					1	
(13)						
(14)					<u> </u>	

WOOD - BYER FOUNDATION Form 990-PF 31-1433019 2014

PART II - LINE 13(b) and 13'(c)

		BOOK	FAIR MARKET
UNITS	DESCRIPTION	VALUE	VALUE
51	VANGUARD BD INDEX SHORT TERM BD	4,089.33	4,077.45
5110 998	DFA US TARGETED VALUE	71,100 29	113,208 60
10300 214	DFA SHORT TERM EXTENDED QUAL	111,540 00	111,139.30
15053 870	DFA FIVE YEAR GLBL FIXED INC	167,056.31	164,538 79
3768	VANGUARD DEVELOPED MARKET	118,860 72	142,731 84
13971.042	DFA INTERNATIONAL VECTOR EQUITY	124,957.10	150,188 70
8981 97	DFA INTERIM EXTENDED QUALITY PO	92,340 62	96,376 53
2442 400	DFA US LARGE CAP	43,230.49	83,017 17
5124.458	DFA EMERGING MRKTS CORE EQU	93,387 52	96,954.74
8575 702	DFA INTL REAL ESTATE	42,100 00	44,936.67
473	VANGUARD TOTAL STK MKT	137,857 59	263,516.00
2486	VANGUARD INDEX VIPERS	25,223.34	49,376 47
810	VANGUARD INDEX FDS	34,016.00	65,610 00
809	VANGUARD MID-CAP GROWTH INDEX	39,115.01	82,202 49
10155 947	VANGUARD SHORT TERM BD	106,997 11	106,434 32
	TOTAL	1,211,871 43	1,574,309.07

35311 WOOD-BYER FOUNDATION

Federal Statements

5/12/2016 12:10 PM

31-1433019 FYE: 12/31/2014

Fees
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r Profe
- Othe
, 16c
, Line
Part
990-PF
- Form
tement 1
Sta

Charitable Purpose	\$ \$	
Adjusted Net	0 O	
Net ivestment	4,873	
=	w w	
Total	4,873	
	w w	
Description	ADVISOR FEES Total	

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Charitable	Purpose	ጭ		\$	
Adjusted	Net	የ		\$	
Net	stment	549		549	
-	Inve	ᡐ		ŵ	
•	lotal	549	1,639	2,188	
•	_	ጭ		w	
:	Description	FOREIGN TAXES PAID	FEDERAL INCOME TAX	Total	

Statement 3 - Form 990-PF, Part I, Line 23 - Other Expenses

Adjusted Charitable Net Purpose	જ			\$ 0
Adjus	ጭ			· ν
Net Investment		173	400	573
Inve	₩			w.
Total		173	791 400	1,364
	₩			w.
Description		Expenses BANK FEES	ADMINISTRATIVE EXPENSES FILING FEES	Total

35311 WOOD-BYER FOUNDATION 31-1433019 FYE: 12/31/2014	Federal Statements	nents	5/12/2016	5/12/2016 12:10 PM
Statem	Statement 4 - Form 990-PF, Part II, Line 13 - Other Investments	ne 13 - Other Investments		•
Description Mutual Fund Investments	Beginning of Year \$ 1,218,415	End of Year 1,211,871	s of Fa	air Market Value 1,574,309
Total	\$ 1,218,415	\$ 1,211,871	\$ 1,574,	1,309
Statement 5 - Form 990-PF, Part X	1 990-PF, Part XV, Line 3a - Gra	V, Line 3a - Grants and Contributions Paid During the Year	During the	
Name	Address			
Address	Relationship Status	Purpose	1	Amount
Adath Israel Congregation Cincinnati OH 45236	3201 East Galbraith Road PC	.d General Support		11,500
Adath Israel Congregation	3201 East Galbraith Road	d Religious School		2,875
American Cancer Society	PO Box 22718	420000000000000000000000000000000000000		
Oklahoma City OK 73123 Cancer Support Community	PC 4918 Cooper Road	General Support		5/5
Cincinnati OH 45242	PC PC	General Support		5,750
Cedar Village Foundation Mason OH 45040	5467	e General Support		3,450
		General Support		1,150
Cincinnati Chapter of HADASSAH Cincinnati OH 45242-0396	m	General Support		5,750
Cincinnati Zoo Cincinnati OH 45220	3400 Vine Street PC	Summer Camp Programs		1,150
Crayons to Computers	1350 Tennessee Ave	General Support		2.300
Cincinnati OH 43223 Freestore Foodbank	1141 Central Parkway			
Cincinnati OH 45202	PC 4360 Cooper Road	General Support		1,000
Cincinnati OH 45242		General Support		2,875
Jewish Family Services Cincinnati OH 45236	Klage	General Support		3,450
Jewish Federation of Cincinnati Cincinnati OH 45236	8499 Ridge Koad PC	General Support		11,500
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Federal Statements

Name	Address	ess	!	
Address	Relationship	Status	Purpose	Amount
Make-A-Wish Ohio, Kentucky & Indiana 2545	2545 Farmer's Drive	Drive		
Columbus OH 45235	PC		General Support	1,150
Muscular Dystrophy Association	1080 Nimitzview Drive	ew Drive		
Cincinnati OH 45230	PC		MG Support Groups	2,300
Purcell-Marian High School	2935 Hackberry Street	y Street		
Cincinnati OH 45206	PC		Education Fund	3,450
SPCA Cincinnati	11900 Conrey Road	Road		
Cincinnati OH 45249	PC		General Support	825
Springer School and Center	2121 Madison Road	Road		
_ Cincinnati OH 45208	PC		General Support	1,150
St. Clare of Assisi Catholic Church 885 Island Park Dr. SuiteA	885 Island Pa	ırk Dr.Suit	ceA	
Daniel Island SC 29492	PC		Building Fund	10,000
Sudden Infant Death Network of Ohio 421 Graham Road Suite H	421 Graham Rc	ad Suite F		
Cuyahoga Falls OH 44221	PC		General Support	200
Weizmann Institute of Science	6735 Telegraph Rd, Suite	h Rd, Suit	e i	
Bloomfield Hills MI 48301	PC		MG Research	2,300
Total			II	75,000