efile GRAPHIC print - DO NOT PROCESS | As Filed Data - | DLN: 93491226007705

Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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

OMB No 1545-0052

2014

Open to Public Inspection

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

Name of foundation
The Getz Foundation

% RICHARD GETZ

Number and street (or P O box number if mail is not delivered to street address)
17450 West 167th Street
Suite

Room/suite

City or town, state or province, country, and ZIP or foreign postal code
Arvada, CO 80007

A Employer identification number
36-6150787

B Telephone number (see instructions)
(303) 607-0040

C If exemption application is pending, check here ▶ ☐

D 1. Foreign organizations, check here ▶ ☐
2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐

E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐

G Check all that apply ☐ Initial return ☐ Initial return of a former public charity
☐ Final return ☐ Amended return
☐ Address change ☐ Name change

H Check type of organization ☑ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year *(from Part II, col. (c), line 16)* ▶$ 3,617,427

J Accounting method ☑ Cash ☐ Accrual
☐ Other (specify) ____________
(Part I, column (d) must be on cash basis.)

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) (see instructions))*

			(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc , received (attach schedule)	0			
	2	Check ▶ ☐ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments	101,024	93,919		
	4	Dividends and interest from securities	82,498	82,498		
	5a	Gross rents	19,319	19,319		
	b	Net rental income or (loss) 19,319				
	6a	Net gain or (loss) from sale of assets not on line 10	1,932			
	b	Gross sales price for all assets on line 6a 1,096,275				
	7	Capital gain net income (from Part IV, line 2)		1,932		
	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) (attach schedule)				
	11	Other income (attach schedule)				
	12	**Total.** Add lines 1 through 11	204,773	197,668		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	40,000	32,000		8,000
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)	5,768	0	0	5,768
	b	Accounting fees (attach schedule)	4,950	0	0	4,950
	c	Other professional fees (attach schedule)	20,910	20,910		
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	4,813	4,086		727
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)	10,118	10,108		10
	24	**Total operating and administrative expenses.** Add lines 13 through 23	86,559	67,104	0	19,455
	25	Contributions, gifts, grants paid	258,200			258,200
	26	**Total expenses and disbursements.** Add lines 24 and 25	344,759	67,104	0	277,655
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	-139,986			
	b	**Net investment income** (if negative, enter -0-)		130,564		
	c	**Adjusted net income** (if negative, enter -0-)				

Part II	Balance Sheets. Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets 1	Cash—non-interest-bearing	25,055	3,195	3,195
2	Savings and temporary cash investments			
3	Accounts receivable ▶ ___ Less allowance for doubtful accounts ▶ ___			
4	Pledges receivable ▶ ___ Less allowance for doubtful accounts ▶ ___			
5	Grants receivable			
6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
7	Other notes and loans receivable (attach schedule) ▶ ___ Less allowance for doubtful accounts ▶ ___			
8	Inventories for sale or use			
9	Prepaid expenses and deferred charges			
10a	Investments—U S and state government obligations (attach schedule)			
b	Investments—corporate stock (attach schedule)	6,796	7,137	10,557
c	Investments—corporate bonds (attach schedule)			
11	Investments—land, buildings, and equipment basis ▶ ___ Less accumulated depreciation (attach schedule) ▶ ___			
12	Investments—mortgage loans			
13	Investments—other (attach schedule)	3,631,671	3,518,883	3,719,333
14	Land, buildings, and equipment basis ▶ ___ Less accumulated depreciation (attach schedule) ▶ ___			
15	Other assets (describe ▶ ___)	-119,868	-115,658	-115,658
16	**Total assets** (to be completed by all filers—see the instructions Also, see page 1, item I)	3,543,654	3,413,557	3,617,427
Liabilities 17	Accounts payable and accrued expenses			
18	Grants payable			
19	Deferred revenue			
20	Loans from officers, directors, trustees, and other disqualified persons			
21	Mortgages and other notes payable (attach schedule)			
22	Other liabilities (describe ▶ ___)			
23	**Total liabilities** (add lines 17 through 22)		0	
Net Assets or Fund Balances	**Foundations that follow SFAS 117, check here** ▶ ☐ **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 ▶ ☑ **and complete lines 27 through 31.**			
27	Capital stock, trust principal, or current funds	3,543,654	3,413,557	
28	Paid-in or capital surplus, or land, bldg , and equipment fund			
29	Retained earnings, accumulated income, endowment, or other funds			
30	**Total net assets or fund balances** (see instructions)	3,543,654	3,413,557	
31	**Total liabilities and net assets/fund balances** (see instructions)	3,543,654	3,413,557	

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	3,543,654
2	Enter amount from Part I, line 27a	2	-139,986
3	Other increases not included in line 2 (itemize) ▶ ___	3	9,889
4	Add lines 1, 2, and 3	4	3,413,557
5	Decreases not included in line 2 (itemize) ▶ ___	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	3,413,557

Part IV Capital Gains and Losses for Tax on Investment Income

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

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	See Additional Data Table			
b				
c				
d				
e				

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	See Additional Data Table			
b				
c				
d				
e				

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	1,932
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8	3	

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

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

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

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2013	277,969	3,589,166	0 077447
2012	282,591	2,582,852	0 10941
2011	274,245	3,723,647	0 07365
2010	351,820	3,714,195	0 094723
2009	393,084	4,187,638	0 093868

2	**Total** of line 1, column (d).	2	0 449098
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0 08982
4	Enter the net value of noncharitable-use assets for 2014 from Part X, line 5.	4	3,429,164
5	Multiply line 4 by line 3.	5	308,008
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	1,306
7	Add lines 5 and 6.	7	309,314
8	Enter qualifying distributions from Part XII, line 4.	8	277,655

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ 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	1	2,611
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	2	
3	Add lines 1 and 2	3	2,611
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-	5	2,611
6	Credits/Payments		
a	2014 estimated tax payments and 2013 overpayment credited to 2014 — 6a		
b	Exempt foreign organizations—tax withheld at source — 6b		
c	Tax paid with application for extension of time to file (Form 8868) — 6c — 1,800		
d	Backup withholding erroneously withheld — 6d		
7	Total credits and payments Add lines 6a through 6d	7	1,800
8	Enter any **penalty** for underpayment of estimated tax Check here ☑ if Form 2220 is attached	8	22
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	833
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	
11	Enter the amount of line 10 to be **Credited to 2015 estimated tax** ▶ **Refunded** ▶	11	

Part VII-A **Statements Regarding Activities**

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		No
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)?	1b		No
	*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?	1c		No
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 ▶ $ ______			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ ______			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities.*	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		No
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a	Yes	
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b	Yes	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col. (c), and Part XV.*	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶IL			
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	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)? *If "Yes," complete Part XIV*	9		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses.*	10		No

Part VII-A Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	

Website address ▶

14 The books are in care of ▶RICHARD GETZ Telephone no ▶(303) 607-0040

Located at ▶17450 W 67TH AVENUE ARVADA CO ZIP+4 ▶80007

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 |

			Yes	No
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?	16		No
	See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes", enter the name of the foreign country ▶			

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

			Yes	No
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			
1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☑ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☑ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☑ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☑ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☑ 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 ☑ No			
b	If any answer is "Yes" to 1a(1)–(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?	1b		
	Organizations relying on a current notice regarding disaster assistance check here. . . ▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2014?	1c		
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? ☐ Yes ☑ 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).	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ▶ 20____ , 20____ , 20____ , 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☑ No			
b	If "Yes," did it have excess business holdings in 2014 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969, **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2014.).*	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2014?	4b		No

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

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)? **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? ☐ Yes ☐ No

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

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

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b** No

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

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

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? **7b**

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

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

(a) Name and address	**(b)** Title, and average hours per week devoted to position	**(c)** Compensation **(If not paid, enter -0-)**	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
Richard Getz 17450 West 67th Ave Arvada, CO 80007	President 10 0	40,000	0	0
RANDOLPH GETZ 17450 West 167th Street Arvada, CO 80007	TRUSTEE 1 0	0	0	0
CINDY WILSON 17450 West 167th Street Arvada, CO 80007	TRUSTEE 1 0	0	0	0

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

(a) Name and address of each employee paid more than $50,000	**(b)** Title, and average hours per week devoted to position	**(c)** Compensation	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances

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

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

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
Total number of others receiving over $50,000 for professional services. . . . . ▶		

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1	
2	
3	
4	

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

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

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities	1a	3,355,063
b	Average of monthly cash balances	1b	12,167
c	Fair market value of all other assets (see instructions)	1c	114,155
d	**Total** (add lines 1a, b, and c)	1d	3,481,385
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	3,481,385
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	52,221
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	3,429,164
6	**Minimum investment return.** Enter 5% of line 5	6	171,458

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	171,458
2a	Tax on investment income for 2014 from Part VI, line 5	2a	2,611		
b	Income tax for 2014 (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	2,611
3	Distributable amount before adjustments Subtract line 2c from line 1			3	168,847
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	168,847
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	168,847

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	277,655
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	0
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	0
b	Cash distribution test (attach the required schedule)	3b	0
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	277,655
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	
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	277,655

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					168,847
2 Undistributed income, if any, as of the end of 2014					
a Enter amount for 2013 only.				0	
b Total for prior years 2012 , 2011 , 2010					
3 Excess distributions carryover, if any, to 2014					
a From 2009.	191,507				
b From 2010.	175,790				
c From 2011.	119,953				
d From 2012.	153,448				
e From 2013.	99,490				
f Total of lines 3a through e.		740,188			
4 Qualifying distributions for 2014 from Part XII, line 4 ▶ $ 277,655					
a Applied to 2013, but not more than line 2a				0	
b Applied to undistributed income of prior years (Election required—see instructions).					
c Treated as distributions out of corpus (Election required—see instructions).					
d Applied to 2014 distributable amount.					168,847
e Remaining amount distributed out of corpus		108,808			
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 indicated below:					
a Corpus Add lines 3f, 4c, and 4e Subtract line 5		848,996			
b Prior years' undistributed income Subtract line 4b from line 2b					
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.					
d Subtract line 6c from line 6b Taxable amount —see instructions					
e Undistributed income for 2013 Subtract line 4a from line 2a Taxable amount—see instructions				0	
f Undistributed income for 2014 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015					0
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) . . .		191,507			
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a		657,489			
10 Analysis of line 9					
a Excess from 2010. . . .	175,790				
b Excess from 2011. . . .	119,953				
c Excess from 2012. . . .	153,448				
d Excess from 2013. . . .	99,490				
e Excess from 2014. . . .	108,808				

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

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

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

	Tax year	Prior 3 years			(e) Total
	(a) 2014	**(b)** 2013	**(c)** 2012	**(d)** 2011	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test—enter					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test—enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV **Supplementary Information (Complete this part only if the organization had $5,000 or more in assets at any time during the year—see instructions.)**

1 **Information Regarding Foundation Managers:**

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

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

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

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

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

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

c Any submission deadlines

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

Part XV Supplementary Information (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year* See Additional Data Table				
Total . . . . ▶ **3a**				258,200
b *Approved for future payment*				
Total . . . . ▶ **3b**				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income (See instructions)
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	101,024	
4 Dividends and interest from securities			14	82,498	
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property			16	19,319	
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	1,932	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a					
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)				204,773	

13 **Total.** Add line 12, columns (b), (d), and (e) 13 204,773

(See worksheet in line 13 instructions to verify calculations)

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions)

Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of			
	(1) Cash.	1a(1)		No
	(2) Other assets.	1a(2)		No
b	Other transactions			
	(1) Sales of assets to a noncharitable exempt organization.	1b(1)		No
	(2) Purchases of assets from a noncharitable exempt organization.	1b(2)		No
	(3) Rental of facilities, equipment, or other assets.	1b(3)		No
	(4) Reimbursement arrangements.	1b(4)		No
	(5) Loans or loan guarantees.	1b(5)		No
	(6) Performance of services or membership or fundraising solicitations.	1b(6)		No
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	1c		No

d If the answer to any of the above is "Yes," complete the following schedule Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received

(a) Line No	**(b)** Amount involved	**(c)** Name of noncharitable exempt organization	**(d)** Description of transfers, transactions, and sharing arrangements

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☑ No

b If "Yes," complete the following schedule

(a) Name of organization	**(b)** Type of organization	**(c)** Description of relationship

Sign Here

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge

******	2015-08-14	******
Signature of officer or trustee	Date	Title

May the IRS discuss this return with the preparer shown below (see instr)? ☑ Yes ☐ No

Paid Preparer Use Only

Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ▶ ☐	PTIN
Shelley A Owens CPA				P00517745

Firm's name ▶ GHP Horwath PC

Firm's EIN ▶

Firm's address ▶ 1801 California Street Suite 2200 Denver, CO 80202

Phone no (303) 831-5000

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
FIDELITY ST-GAIN SEE ATTACHED	P	2014-01-01	2014-10-31
FIDELITY LT-GAIN SEE ATTACHED	P	2013-01-22	2014-11-28
EVEREST K-1 SHORT-TERM	P		
EVEREST K-1 LONG-TERM	P		
EVEREST K-1 SECTION 1231	P		
WESTERN GAS K-1 LONG-TERM	P		
OAKTREE K-1 SHORT-TERM	P		
OAKTREE K-1 LONG-TERM	P		
FIDELITY CAPITAL GAIN DISTRIBUTIONS	P		
OAKTREE K-1 SECTION 1256	P		

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
807,119		792,269	14,850
289,156		296,147	-6,991
			-4,183
			36
			-13,146
			7
			22
			192
			11,137
			8

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			**(l)** Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	**(j)** Adjusted basis as of 12/31/69	**(k)** Excess of col (i) over col (j), if any	
			14,850
			-6,991

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
ASPEN HISTORICAL SOCIETY 620 WEST BLEEKER STREET ASPEN, CO 81611	NONE	PC	TO PRESERVE AND PRESENT ASPEN HISTORY	1,000
GREENWOOD SCHOOL 9920 REGENCY SQUARE BOULEVARD JACKSONVILLE, FL 32225	NONE	PC	TO PROVIDE SCHOOLING FOR NON-TRADITONAL LEARNERS IN MIDDLE SCHOOL AND HIGH SCHOOL	25,000
GRRAND P O BOX 55 LOUISVILLE, KY 40059	NONE	PC	RESCUE AND REHABILITATION OF GOLDEN RETRIEVERS	2,500
HOUSTON LIVESTOCK P O BOX 20070 HOUSTON, TX 77225	NONE	PC	PROMOTE BREEDING OF BETTER LIVESTOCK AND FARM PRODUCTS AND TO PROMOTE RESEARCH AND EDUCATION WITHIN THE LIVESTOCK INDUSTRY	8,900
JAZZ ASPEN SNOWMASS 110 E HALLAM STREET ATE 104 ASPEN, CO 81611	NONE	PC	PRESENT AND PRESERVE JAZZ	50,000
OSCAR GETZ MUSEUM 114 NORTH FIFTH STREET BARDSTOWN, KY 40004	NONE	PC	PRESERVATION OF AMERICAN HISTORY	25,000
THE PAINTED TURTLE 1300 4th Street Ste 300 Santa Monica, CA 90401	NONE	PC	CAMP PROGRAMS FOR SERIOUSLY ILL CHILDREN	1,000
ROARING FORK CONSERVANCY P O BOX 3349 BASALT, CO 81621	NONE	PC	RIVER CONSERVATION	3,000
ASPEN YOUTH CENTER P O BOX 8266 ASPEN, CO 81612	NONE	PC	TO PROVIDE A SAFE AND SUPPORTIVE PLACE FOR YOUTH TO CONNECT, LEARN, AND GROW	500
CU FOUNDATION 1800 GRANT STREET STE 725 DENVER, CO 80203	NONE	PC	TO PROVIDE SUPPORT FOR THE UNIVERSITY OF COLORADO	10,000
ROARING FORK OUTDOOR VOLUNTEERS P O BOX 1341 BASALT, CO 81621	NONE	PC	VOLUNTEER STEWARDSHIP OF TRAILS AND PUBLIC LANDS	500
FOOTHILLS CARING CORPS P O BOX 831 CAREFREE, AZ 85377	NONE	PC	TO ENHANCE QUALITY OF LIFE AND PROMOTE INDEPENDENCE OF HOMEBOUND RESIDENTS OF THE FOOTHILLS	10,000
TRASHMASTERS SCHOLARSHIP FUND P O BOX 6200 SNOWMASS VILLAGE, CO 81615	NONE	PC	TO PROVIDE COLLEGE SCHOLARSHIPS TO NEEDY LOCAL HIGH SCHOOL SENIORS	5,000
UK DANCE TEAM 338 LEXINGTON AVE LEXINGTON, KY 40506	NONE	PC	SUPPORT FOR COLLEGIATE DANCE	5,000
WEST WOODS ELEMENTARY PTSA 16650 W 72ND AVENUE ARVADA, CO 80007	NONE	PC	TO SPONSOR THE RUN WITH THE WOLVES 5K RACE FOR THE BENEFIT OF WEST WOODS ELEMENTARY	2,500
Total . . . . ▶ **3a**				258,200

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
U S SKI TEAM FOUNDATION P O BOX 100 PARK CITY, UT 84060	NONE	PC	SUPPORT OF AMATEUR SKIING AND SNOWBOARDING	20,000
ASPEN VALLEY SKI & SNOWBOARD CLUB 300 AVSC DRIVE ASPEN, CO 81611	NONE	PC	TO PROVIDE YOUTH OF THE GREATER ROARING FORK VALLEY THE OPPORTUNITY TO GROW AS ATHLETES AND PEOPLE THROUGH WINTER SPORTS	5,000
ARVADA HOCKEY ASSOCIATION P O BOX 740908 ARVADA, CO 80006	NONE	PC	SUPPORT OF YOUTH HOCKEY	1,000
ASPEN CENTER FOR ENVIRONMENTAL STUDIES 100 PUPPY SMITH STREET ASPEN, CO 81611	NONE	PC	ENVIRONMENTAL SCIENCE EDUCATION	300
DENVER RESCUE MISSION 3501 E 46TH AVENUE DENVER, CO 80216	NONE	PC	CARING FOR THE NEEDY AND HOMELESS OF THE DENVER METRO AND NORTHERN COLORADO AREAS	1,000
FORD'S THEATRE SOCIETY 511 TENTH STREET NW WASHINGTON, DC 20004	NONE	PC	CELEBRATE THE LEGACY OF ABRAHAM LINCOLN AND EXPLORE THE AMERICAN EXPERIENCE THROUGH THEATRE AND EDUCATION	20,000
FOUNDATION FOR PHYSICAL THERAPY 1111 N FAIRFAX STREET ALEXANDRIA, VA 22314	NONE	PC	FUND AND PUBLICIZE RESEARCH FOR PHYSICAL THERAPY	1,000
MULTIPLE SCLEROSIS FOUNDATION INC 6520 NORTH ANDREWS AVENUE FT LAUDERDALE, FL 33309	NONE	PC	PROVIDE PROGRAMS AND SERVICES TO THOSE WITH MULTIPLE SCLEROSIS	1,000
NATIONAL JEWISH HEALTH 1400 JACKSON STREET DENVER, CO 80206	NONE	PC	TO HEAL, DISCOVER, AND EDUCATE FOR HEALTH CARE	500
NORTH JEFFERSON JUNIOR BASEBALL ASSOCIATION 6385 WEST 52ND AVENUE ARVADA, CO 80006	NONE	PC	SUPPORT YOUTH BASEBALL	500
PATHFINDERS P O BOX 11799 ASPEN, CO 81612	NONE	PC	Support cancer patients, caregivers, individuals suffering from grief and loss and families dealing with life-threatening illnesses	1,000
PEDIATRIC BRAIN TUMOR FOUNDATION 302 RIDGEFIELD COURT ASHEVILLE, NC 28806	NONE	PC	CHILDHOOD BRAIN TUMOR RESEARCH	1,000
PLANNED PARENTHOOD OF THE ROCKY MOUNTAINS 7155 EAST 38TH AVENUE DENVER, CO 80207	NONE	PC	PROVIDE WOMEN'S HEALTH SERVICES	1,000
SOS OUTREACH P O BOX 2020 AVON, CO 81620	NONE	PC	OUTREACH PROGRAMS FOR UNDERSERVED YOUTH TO INSPIRE THEM TO MAKE POSITIVE LIFE DECISIONS	1,000
SOUTHWEST CENTER FOR HIVAIDS 1101 NORTH CENTRAL AVENUE SUITE 200 PHOENIX, AZ 85004	NONE	PC	HIV PREVENTION, EDUCATOIN, TESTING, AND COUNSELING	3,000
Total . . . . ▶ **3a**				258,200

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
UCSF FOUNDATION P O BOX 45339 SAN FRANCISCO, CA 94145	NONE	PC	CANCER RESEARCH AND CLINICAL PROGRAMS	1,000
VALLEY OF THE SUN YMCA 350 N 1ST AVENUE PHOENIX, AZ 85003	NONE	PC	ENRICH THE QUALITY OF MENTAL, PHYSICAL, SPIRITUAL AND SOCIAL LIFE FOR INDIVIDUALS, FAMILIES AND COMMUNITIES	50,000
Total . . . . ▶ **3a**				258,200

efile GRAPHIC print - DO NOT PROCESS | As Filed Data - | DLN: 93491226007705

Form **8949**

Department of the Treasury
Internal Revenue Service

Sales and Other Dispositions of Capital Assets

▶ Information about Form 8949 and its separate instructions is at *www.irs.gov/form8949.*
▶ File with your Schedule D to list your transactions for lines 1b, 2, 3, 8b, 9, and 10 of Schedule D.

OMB No 1545-0123

2014

Attachment Sequence No **12A**

Name(s) shown on return

Social security number or taxpayer identification number

36-6150787

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

Part I **Short-Term.** Transactions involving capital assets you held 1 year or less are short term. For long-term transactions, see page 2.
Note. You may aggregate all short-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which NO adjustments or codes are required. Enter the total directly on Schedule D, line 1a; you are not required to report these transactions on Form 8949 (see instructions).

You *must* check Box A, B, *or* C below. Check only one box. If more than one box applies for your short-term transactions, complete a separate Form 8949, page 1, for each applicable box If you have more short-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need

☐ **(A)** Short-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see **Note** above)
☐ **(B)** Short-term transactions reported on Form(s) 1099-B showing basis was **not** reported to the IRS
☑ **(C)** Short-term transactions not reported to you on Form 1099-B

1 (a) Description of property (Example 100 sh XYZ Co)	(b) Date acquired (Mo , day, yr)	(c) Date sold or disposed (Mo , day, yr)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis See the **Note** below and see *Column (e)* in the separate instructions	Adjustment, if any, to gain or loss If you enter an amount in column (g), enter a code in column (f) See the separate instructions (f) Code(s) from instructions	(g) Amount of adjustment	(h) **Gain or (loss).** Subtract column (e) from column (d) and combine the result with column (g)
FIDELITY ST-	01-01-2014	10-31-2014	807,119	(792,269)			14,850
2 Totals Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts) Enter each total here and include on your Schedule D, **line 1b** (if **Box A** above is checked), **line 2** (if **Box B** above is checked), or **line 3** (if **Box C** above is checked) . . . . ▶			807,119	(792,269)			14,850

Note. If you checked Box A above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and enter an adjustment in column (g) to correct the basis See *Column* (g) in the separate instructions for how to figure the amount of the adjustment

Name(s) shown on return Name and SSN or taxpayer identification no not required if shown on other side	Social security number or taxpayer identification number
The Getz Foundation	36-6150787

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

Part II **Long-Term.** Transactions involving capital assets you held more than 1 year are long term. For short-term transactions, see page 1.

Note. You may aggregate all long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which NO adjustments or codes are required. Enter the total directly on Schedule D, line 8a; you are not required to report these transactions on Form 8949 (see instructions).

You *must* check Box D, E, *or* F below. Check only one box. If more than one box applies for your long-term transactions, complete a separate Form 8949, page 2, for each applicable box If you have more long-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need

☑ **(D)** Long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see **Note** above)

☐ **(E)** Long-term transactions reported on Form(s) 1099-B showing basis was **not** reported to the IRS

☐ **(F)** Long-term transactions not reported to you on Form 1099-B

1 (a) Description of property (Example 100 sh XYZ Co)	(b) Date acquired (Mo, day, yr)	(c) Date sold or disposed (Mo, day, yr)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis See the **Note** below and see *Column (e)* in the separate instructions	Adjustment, if any, to gain or loss If you enter an amount in column (g), enter a code in column (f) See the separate instructions (f) Code(s) from instructions	(g) Amount of adjustment	(h) **Gain or (loss).** Subtract column (e) from column (d) and combine the result with column (g)
FIDELITY LT-	01-22-2013	11-28-2014	289,156	(296,147)			-6,991
2 Totals Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts) Enter each total here and include on your Schedule D, **line 8b** (if **Box D** above is checked), **line 9** (if **Box E** above is checked), or **line 10** (if **Box F** above is checked) ▶			289,156	(296,147)			-6,991

Note. If you checked Box D above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and enter an adjustment in column (g) to correct the basis See *Column* (g) in the separate instructions for how to figure the amount of the adjustment

TY 2014 Accounting Fees Schedule

Name: The Getz Foundation

EIN: 36-6150787

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	4,950			4,950

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2014 Depreciation Schedule

Name: The Getz Foundation

EIN: 36-6150787

TY 2014 Investments Corporate Stock Schedule

Name: The Getz Foundation

EIN: 36-6150787

Name of Stock	End of Year Book Value	End of Year Fair Market Value
CORPORATE STOCK	7,137	10,557

TY 2014 Investments - Other Schedule

Name: The Getz Foundation

EIN: 36-6150787

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
VANGUARD MONEY MARKET	FMV	139,661	139,661
EVEREST REAL ESTATE	AT COST	38,708	38,708
SENIOR LIFESTYLE INVESTORS	AT COST	43,633	43,633
OAKTREE CAPITAL GROUP, LLC	AT COST	0	0
SAGE INVESTMENTS	AT COST	3,146,881	3,347,331
SCHWAB MONEY MARKET	AT COST	0	0
BAYBERRY CONSUMER FINANCE FUND	AT COST	150,000	150,000

TY 2014 Legal Fees Schedule

Name: The Getz Foundation

EIN: 36-6150787

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	5,768			5,768

efile GRAPHIC print - DO NOT PROCESS	As Filed Data -	DLN: 93491226007705

TY 2014 Other Assets Schedule

Name: The Getz Foundation

EIN: 36-6150787

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
SD 5TH AVE	-119,868	-118,186	-118,186
DIVIDENDS RECEIVABLE	0	2,528	2,528

TY 2014 Other Expenses Schedule

Name: The Getz Foundation

EIN: 36-6150787

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
SD 5TH AVENUE K-1 DEDUCTIONS	2,272	2,272		
OAKTREE K-1 PORTFOLIO DEDUCT	30	30		
BAYBERRY K-1 PORTFOLIO DEDUCT	3,808	3,808		
LICENSE FEES	10			10
OTHER K-1 INCOME (LOSS)	3,998	3,998		

TY 2014 Other Increases Schedule

Name: The Getz Foundation

EIN: 36-6150787

Description	Amount
UNREALIZED GAINS/LOSSES FROM K-1'S	9,889

TY 2014 Other Professional Fees Schedule

Name: The Getz Foundation

EIN: 36-6150787

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT FEES	20,910	20,910		

TY 2014 Taxes Schedule

Name: The Getz Foundation

EIN: 36-6150787

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
STATE TAXES	283	168		115
PAYROLL TAXES	3,060	2,448		612
FEDERAL TAXES	1,261	1,261		
FOREIGN TAXES	209	209		

Fidelity INVESTMENTS

2014 Informational Tax Reporting Statement

GETZ FOUNDATION

Account No **676-186781** Customer Service 781-344-1023

Recipient ID No ****-***0787** Payer's Fed ID Number 04-3523567

Note: This information is not reported to the IRS. It may assist you in tax return preparation.

Short-term transactions

(IRS Form 1099-B box numbers are shown below in **bold** type)

1a Description of property, Stock or Other Symbol, CUSIP Action	Quantity	**1b** Date Acquired	**1c** Date Sold or Disposed	**1d** Proceeds	**1e** Cost or Other Basis (a)	**1f** Code, If Any (c) **1g** Adjustments	Gain/Loss (-)	**4 Federal Income Tax Withheld**	**14** State	**16** State Tax Withheld
COTT BEVERAGES INC SR NT 8 12500% 09/01/, 221643AF6										
Redemption	80,000 000	08/21/13	07/24/14	83,865 60	85,432 78		-1,567 18			
CROSSTEX ENERGY L P / CORP 8 87500% 02/1, 22764LAB9										
Redemption	25,000 000	06/26/13	04/21/14	26,109 50	26,267 97		-158 47			
ENBRIDGE ENERGY MGMTLLC SHS UNITS REPSTG, EEQ, 29250X103										
Cash In Lieu	0 000	02/18/14	02/18/14	17 27	0 00		17 27			
FIFTH ST FIN CORP COM, FSC, 31678A103										
Sale	2,242 000	07/01/13	03/14/14	21,134 46	23,527 39		-2,392 93			
Sale	200 000	07/01/13	03/14/14	1,885 32	2,098 78		-213 46			
Sale	58 000	07/01/13	03/14/14	546 74	608 70		-61 96			
Subtotals				**23,566.52**	**26,234.87**					
ICAHN ENTERPRISES LP/CORP 8 00000% 01/15, 451102AH0										
Redemption	100,000 000	09/09/13	02/06/14	104,000 00	105,075 17		-1,075 17			
Redemption	25,000 000	09/09/13	02/06/14	26,000 00	26,285 97		-285 97			
Subtotals				**130,000.00**	**131,361.14**					
LORD ABBETT FLOATINGRATE FUND I, LFRIX, 543916134										
Sale	4,721 931	01/22/13	01/15/14	44,980 00	44,824 74		155 26			
MATADOR RESOURCES COMPANY COM USD0 01, MTDR, 576485205										
Sale	1,300 000	04/01/14	05/15/14	31,405 98	32,417 60		-1,011 62			

***Our records indicate that you are an exempt recipient for 1099 reporting purposes. This statement provided is based on IRS information reporting requirements for individuals as of the preparation date and is NOT furnished to the IRS. You may be subject to different income tax reporting requirements. Please contact your tax advisor if you have any questions.**

Fidelity INVESTMENTS

2014 Informational Tax Reporting Statement

GETZ FOUNDATION

Account No **676-186781** Customer Service 781-344-1023

Recipient ID No ****-***0787** Payer's Fed ID Number 04-3523567

Note: This information is not reported to the IRS. It may assist you in tax return preparation.

Short-term transactions

(IRS Form 1099-B box numbers are shown below in **bold** type)

1a Description of property, Stock or Other Symbol, CUSIP

Action	Quantity	**1b** Date Acquired	**1c** Date Sold or Disposed	**1d** Proceeds	**1e** Cost or Other Basis (a)	**1f** Code, If Any (c) **1g** Adjustments	Gain/Loss (-)	**4 Federal Income Tax Withheld**	**14** State	**16** State Tax Withheld
ONEOK INC, OKE, 682680103										
Sale	1,200 000	04/01/14	08/01/14	76,443 21	70,555 95		5,887 26			
Sale	600 000	04/02/14	08/01/14	38,221 60	35,581 89		2,639 71			
Subtotals				**114,664.81**	**106,137.84**					
PENN VA RESOURCE PARTNERS LP SR NT 08 25, 70788AAA6										
Redemption	30,000 000	08/01/13	04/23/14	31,237 50	31,373 19		-135 69			
PIMCO ALL ASSET ALL AUTHORITY-INSTIT CL, PAUIX, 72200Q182										
Sale	1,513 623	01/22/13	01/15/14	14,980 00	16,925 44		-1,945 44			
Sale	2,522 704	01/22/13	01/15/14	24,980 00	28,209 05		-3,229 05			
Subtotals				**39,960.00**	**45,134.49**					
PROSHARES TR SHORT HIGH YIELD, SJB, 74347R131										
Sale	250 000	06/20/13	04/01/14	7,092 47	7,964 75		-872 28			
Sale	500 000	06/20/13	04/01/14	14,184 93	15,929 50		-1,744 57			
Subtotals				**21,277.40**	**23,894.25**					
PROSHARES TR SHORT 20+ YR TREASURY, TBF, 74347X849										
Sale	600 000	06/20/13	01/15/14	19,299 77	18,862 80		436 97			
Sale	400 000	06/20/13	03/14/14	12,184 84	12,575 20		-390 36			
Sale	700 000	08/15/13	03/14/14	21,323 46	23,140 60		-1,817 14			
Subtotals				**52,808.07**	**54,578.60**					
U S SILICA HLDGS INCCOM USD0 01, SLCA, 90346E103										
Sale	750 000	04/01/14	08/01/14	41,539 63	28,880 14		12,659 49			

***Our records indicate that you are an exempt recipient for 1099 reporting purposes. This statement provided is based on IRS information reporting requirements for individuals as of the preparation date and is NOT furnished to the IRS. You may be subject to different income tax reporting requirements. Please contact your tax advisor if you have any questions.**

Fidelity INVESTMENTS

2014 Informational Tax Reporting Statement

GETZ FOUNDATION

Account No **676-186781** Customer Service 781-344-1023
Recipient ID No ****-***0787** Payer's Fed ID Number 04-3523567

Note: This information is not reported to the IRS. It may assist you in tax return preparation.

Short-term transactions

(IRS Form 1099-B box numbers are shown below in **bold** type)

1a Description of property, Stock or Other Symbol, CUSIP

Action	Quantity	**1b** Date Acquired	**1c** Date Sold or Disposed	**1d** Proceeds	**1e** Cost or Other Basis (a)	**1f** Code, If Any (c) **1g** Adjustments	Gain/Loss (-)	**4 Federal Income Tax Withheld**	**14** State	**16** State Tax Withheld
UBS AG JERSEY BRANCHE-TRACS LKD ALERIAN, MLPL, 902664200										
Sale	650 000	06/09/14	07/31/14	41,838 12	42,907 95		-1,069 83			
WESTERN GAS EQUITY PARTNERS LP COM UNIT, WGP, 95825R103										
Sale	1,250 000	03/19/14	08/01/14	68,369 56	57,001 45		11,368 11			
Sale	500 000	04/14/14	08/01/14	27,347 82	24,213 35		3,134 47			
Subtotals				**95,717.38**	**81,214.80**					
WISDOMTREE TR EUROPESMALLCAP DIVID FD, DFE, 97717W869										
Sale	500 000	04/01/14	08/01/14	28,131 42	31,608 98		-3,477 56			
TOTALS				**807,119.20**	**792,269.34**			**0.00**		
		Short-Term Realized Gain					**36,298.54**			
		Short-Term Realized Loss					**-21,448.68**			
		Wash Sale Loss Disallowed				**0.00**				
		Market Discount				**0.00**				

***Our records indicate that you are an exempt recipient for 1099 reporting purposes. This statement provided is based on IRS information reporting requirements for individuals as of the preparation date and is NOT furnished to the IRS. You may be subject to different income tax reporting requirements. Please contact your tax advisor if you have any questions.**

Fidelity INVESTMENTS

2014 Informational Tax Reporting Statement

GETZ FOUNDATION

Account No **676-186781** Customer Service 781-344-1023
Recipient ID No ****-***0787** Payer's Fed ID Number 04-3523567

Note: This information is not reported to the IRS. It may assist you in tax return preparation.

Long-term transactions

(IRS Form 1099-B box numbers are shown below in **bold** type)

1a Description of property, Stock or Other Symbol, CUSIP

Action	Quantity	**1b** Date Acquired	**1c** Date Sold or Disposed	**1d** Proceeds	**1e** Cost or Other Basis (a)	**1f** Code, If Any (c) **1g** Adjustments	Gain/Loss (-)	**4 Federal Income Tax Withheld**	**14** State	**16** State Tax Withheld
CROSSTEX ENERGY L P / CORP 8 87500% 02/1, 22764LAB9										
Redemption	50,000 000	03/07/13	04/21/14	52,219 00	53,482 83		-1,263 83			
ENBRIDGE ENERGY MGMTLLC SHS UNITS REPSTG, EEQ, 29250X103										
Sale	744 246	01/22/13	03/19/14	20,193 88	21,014 32		-820 44			
Sale	656 715	01/22/13	03/19/14	17,818 87	18,539 98		-721 11			
Sale	436 810	01/22/13	03/19/14	11,852 13	12,333 38		-481 25			
Sale	131 229	01/22/13	03/19/14	3,560 70	3,708 00		-147 30			
Subtotals				**53,425.58**	**55,595.68**					
JPMORGAN STRATEGIC INCOME OPPS - SELECT, JSOSX, 4812A4351										
Sale	2,095 557	01/29/13	03/03/14	24,980 00	25,060 54		-80 54			
Sale	2,918 360	various	04/16/14	34,766 85	34,900 35		-133 50			
Subtotals				**59,746.85**	**59,960.89**					
OAKTREE CAP GROUP LLC UNITS CL A, OAK, 674001201										
Sale	400 000	04/10/13	05/13/14	20,403 17	20,995 18		-592 01			
Sale	400 000	04/10/13	05/13/14	20,403 17	20,995 17		-592 00			
Sale	100 000	04/10/13	05/13/14	5,100 79	5,243 90		-143 11			
Sale	100 000	04/10/13	05/13/14	5,100 79	5,246 90		-146 11			
Subtotals				**51,007.92**	**52,481.15**					
TARGA RES PARTNERS / TARGA RES 7 87500%, 87612BAF9										
Redemption	70,000 000	08/01/13	11/28/14	72,756 60	74,625 97		-1,869 37			

***Our records indicate that you are an exempt recipient for 1099 reporting purposes. This statement provided is based on IRS information reporting requirements for individuals as of the preparation date and is NOT furnished to the IRS. You may be subject to different income tax reporting requirements. Please contact your tax advisor if you have any questions.**

Fidelity INVESTMENTS

2014 Informational Tax Reporting Statement

GETZ FOUNDATION

Account No **676-186781** Customer Service 781-344-1023

Recipient ID No ****-***0787** Payer's Fed ID Number 04-3523567

Note: This information is not reported to the IRS. It may assist you in tax return preparation.

Long-term transactions

(IRS Form 1099-B box numbers are shown below in **bold** type)

1a Description of property, Stock or Other Symbol, CUSIP

Action	Quantity	**1b** Date Acquired	**1c** Date Sold or Disposed	**1d** Proceeds	**1e** Cost or Other Basis (a)	**1f** Code, If Any (c) **1g** Adjustments	Gain/Loss (-)	**4 Federal Income Tax Withheld**	**14** State	**16** State Tax Withheld
TOTALS				**289,155.95**	**296,146.52**			**0.00**		
		Long-Term Realized Gain					**0.00**			
		Long-Term Realized Loss					**-6,990.57**			
		Wash Sale Loss Disallowed				**0.00**				
		Market Discount				**0.00**				

(a) Cost or other basis provided may include adjustments including, but not limited to, dividend reinvestment, return of capital/principal, wash sale loss disallowed, amortization, accretion, acquisition premium, bond premium, market discount, market premium, and option premium

(c) D = Market Discount, W = Wash Sale

Amortization, accretion, and similar adjustments to cost basis are not provided for short-term instruments, unit investment trusts, or securities of foreign issuers

***Our records indicate that you are an exempt recipient for 1099 reporting purposes. This statement provided is based on IRS information reporting requirements for individuals as of the preparation date and is NOT furnished to the IRS. You may be subject to different income tax reporting requirements. Please contact your tax advisor if you have any questions.**