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
MARION AND HENRY BLOCH FAMILY FOUNDATION

A Employer identification number
45-4047901

Number and street (or P O box number if mail is not delivered to street address) Room/suite
1 H R BLOCK WAY

B Telephone number (see instructions)
(816) 854-4361

City or town, state or province, country, and ZIP or foreign postal code
KANSAS CITY, MO 64105

C If exemption application is pending, check here ▶ ☐

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

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

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

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

I Fair market value of all assets at end of year *(from Part II, col. (c), line 16)* ▶$ 268,657,559

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

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

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)	5,000,000			
	2	Check ▶ ☐ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments	137	137		
	4	Dividends and interest from securities	6,456,731	5,078,627		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	7,090,368			
	b	Gross sales price for all assets on line 6a 38,739,484				
	7	Capital gain net income (from Part IV, line 2)		7,503,487		
	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)	-7,463,096	1,222,527		
	12	**Total.** Add lines 1 through 11	11,084,140	13,804,778		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	0	0		0
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)	16,041	4,010		12,031
	b	Accounting fees (attach schedule)	38,715	30,972		7,743
	c	Other professional fees (attach schedule)	1,596,327	681,455		585,745
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	82,292	32,240		0
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings	4,063	406		3,657
	22	Printing and publications				
	23	Other expenses (attach schedule)	28,510	608		20,822
	24	**Total operating and administrative expenses.** Add lines 13 through 23	1,765,948	749,691		629,998
	25	Contributions, gifts, grants paid	7,918,481			7,918,481
	26	**Total expenses and disbursements.** Add lines 24 and 25	9,684,429	749,691		8,548,479
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	1,399,711			
	b	**Net investment income** (if negative, enter -0-)		13,055,087		
	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	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	391,831	506,419	506,419
	2	Savings and temporary cash investments	11,812,034	11,629,228	11,629,228
	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)			
	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)	255,000,412	256,521,912	256,521,912
	14	Land, buildings, and equipment basis ▶			
		Less accumulated depreciation (attach schedule) ▶			
	15	Other assets (describe ▶)	33,658	0	0
	16	**Total assets** (to be completed by all filers—see the instructions Also, see page 1, item I)	267,237,935	268,657,559	268,657,559
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 ▶)	5,737	25,650	
	23	**Total liabilities** (add lines 17 through 22)	5,737	25,650	
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	267,232,198	268,631,909	
	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			
	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)	267,232,198	268,631,909	
	31	**Total liabilities and net assets/fund balances** (see instructions)	267,237,935	268,657,559	

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	267,232,198
2	Enter amount from Part I, line 27a	2	1,399,711
3	Other increases not included in line 2 (itemize) ▶	3	0
4	Add lines 1, 2, and 3	4	268,631,909
5	Decreases not included in line 2 (itemize) ▶	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	268,631,909

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	7,503,487
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8	3	

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

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

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

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2013	6,170,651	252,916,578	0 024398
2012	3,093,192	118,196,488	0 026170
2011	10,000	487,575	0 020510
2010			
2009			

2	**Total** of line 1, column (d).	2	0 071078
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 023693
4	Enter the net value of noncharitable-use assets for 2014 from Part X, line 5.	4	268,330,144
5	Multiply line 4 by line 3.	5	6,357,546
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	130,551
7	Add lines 5 and 6.	7	6,488,097
8	Enter qualifying distributions from Part XII, line 4.	8	8,548,479

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	130,551
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	2	0
3	Add lines 1 and 2	3	130,551
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	0
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-	5	130,551
6	Credits/Payments		
a	2014 estimated tax payments and 2013 overpayment credited to 2014 — **6a** 146,036		
b	Exempt foreign organizations—tax withheld at source — **6b**		
c	Tax paid with application for extension of time to file (Form 8868) — **6c** 30,000		
d	Backup withholding erroneously withheld — **6d**		
7	Total credits and payments Add lines 6a through 6d	7	176,036
8	Enter any **penalty** for underpayment of estimated tax Check here ☐ if Form 2220 is attached	8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	45,485
11	Enter the amount of line 10 to be **Credited to 2015 estimated tax** ▶ 45,485 **Refunded** ▶	11	0

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 ▶ $ 0 **(2)** On foundation managers ▶ $ 0			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ 0			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities.*	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		No
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
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) ▶ MO			
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)*

			Yes	No
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 ▶BLOCHFAMILYFOUNDATION ORG

14 The books are in care of ▶DAVID MILES Telephone no ▶(816) 854-4372

Located at ▶1 H R BLOCK WAY KANSAS CITY MO ZIP+4 ▶64105

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

	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.		Yes	No
1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☑ 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		No
	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		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? ☐ 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
See Additional Data Table				

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

(a) Name and address of each employee paid more than $50,000	**(b)** Title, and average hours per week devoted to position	**(c)** Compensation	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
NONE				
Total number of other employees paid over $50,000 ▶				0

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

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

(a) Name and address of each person paid more than $50,000	**(b)** Type of service	**(c)** Compensation
HRB MANAGEMENT INC 1 H R BLOCK WAY KANSAS CITY, MO 64105	MANAGEMENT	287,688
CAMBRIDGE ASSOCIATES LLC 100 SUMMER STREET BOSTON, MA 02110	INVESTMENT ADVISOR	131,465
Total number of others receiving over $50,000 for professional services. . . . . ▶		0

Part IX-A **Summary of Direct Charitable Activities**

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

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments See instructions **3**	
Total. Add lines 1 through 3 . . . . ▶	0

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities	1a	262,819,035
b	Average of monthly cash balances	1b	9,597,355
c	Fair market value of all other assets (see instructions)	1c	0
d	**Total** (add lines 1a, b, and c)	1d	272,416,390
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) — 1e: 0		
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	272,416,390
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	4,086,246
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	268,330,144
6	**Minimum investment return.** Enter 5% of line 5	6	13,416,507

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	13,416,507
2a	Tax on investment income for 2014 from Part VI, line 5 — 2a: 130,551		
b	Income tax for 2014 (This does not include the tax from Part VI) — 2b:		
c	Add lines 2a and 2b	2c	130,551
3	Distributable amount before adjustments Subtract line 2c from line 1	3	13,285,956
4	Recoveries of amounts treated as qualifying distributions	4	0
5	Add lines 3 and 4	5	13,285,956
6	Deduction from distributable amount (see instructions)	6	0
7	**Distributable amount** as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	13,285,956

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	8,548,479
b	Program-related investments—total from Part IX-B	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	8,548,479
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	130,551
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	8,417,928

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				13,285,956
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only.			8,099,018	
b Total for prior years 20___ , 20___ , 20___		0		
3 Excess distributions carryover, if any, to 2014				
a From 2009.				
b From 2010.				
c From 2011.				
d From 2012.				
e From 2013.				
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2014 from Part XII, line 4 ▶ $ 8,548,479				
a Applied to 2013, but not more than line 2a			8,099,018	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2014 distributable amount.				449,461
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2014 *(If an amount appears in column (d), the same amount must be shown in column (a).)*	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0			
b Prior years' undistributed income Subtract line 4b from line 2b		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount —see instructions		0		
e Undistributed income for 2013 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2014 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015				12,836,495
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0			
8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions) . . .	0			
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a	0			
10 Analysis of line 9				
a Excess from 2010. . . .				
b Excess from 2011. . . .				
c Excess from 2012. . . .				
d Excess from 2013. . . .				
e Excess from 2014. . . .				

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

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

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

	Tax year	Prior 3 years			
	(a) 2014	**(b)** 2013	**(c)** 2012	**(d)** 2011	**(e) Total**
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))

HENRY W BLOCH

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 e-mail address of the person to whom applications should be addressed

MARION HENRY BLOCH FAMILY FOUNDATIO
ONE HR BLOCK WAY
KANSAS CITY,MO 64105
(816) 854-4361

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

VISIT BLOCHFAMILYFOUNDATION ORG FOR GRANT APPLICATIONS AND SUBMISSION GUIDELINES

c Any submission deadlines

VISIT BLOCHFAMILYFOUNDATION ORG FOR CURRENT SUBMISSION DEADLINES

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

THE FOUNDATION GENERALLY MAKES ONE-YEAR GRANTS HOWEVER, THE FOUNDATION WILL CONSIDER MULTI-YEAR REQUESTS GRANTS ARE MADE ONLY TO TAX EXEMPT 501(C)(3) ORGANIZATONS THAT ARE NOT CLASSIFIED AS PRIVATE FOUNDATIONS THE FOUNDATION CONSIDERS SUPPORT FOR ORGANIZATIONS THAT ARE BASED IN AND SERVICE RESIDENTS WITHIN THE GREATER KANSAS CITY AREA

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**				7,918,481
b *Approved for future payment* See Additional Data Table				
Total . . . . ▶ **3b**				725,000

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	137	
4 Dividends and interest from securities			14	6,456,731	
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property					
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	7,090,368	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a INCOME (LOSS) FROM PASSTHROUGHS	523000	-256,298	14	253,788	0
b UNREALIZED GAIN (LOSS) ON INVESTMENTS			14	-7,460,586	0
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)		-256,298		6,340,438	0

13 Total. Add line 12, columns (b), (d), and (e) . . . 13 6,084,140

(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

******	2015-10-07	******
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
CARLEY UMSTEAD				P00982177

Firm's name ▶ MCGLADREY LLP

Firm's EIN ▶ 42-0714325

Firm's address ▶ 221 THIRD AVENUE SE STE 300 CEDAR RAPIDS, IA 524011512

Phone no (319) 298-5333

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)
COMMERCE BONDS			
OAKWOOD REAL ESTATE PARTNERS			
SCHWAB FPA CRESCENT			
SCHWAB VANGUARD RUSSELL 3000			
SCHWAB VANGUARD RUSSELL 3000			
SCHWAB TEMPLTEON GLOBAL			
SCHWAB LAZARD GLOBAL			
SCHWAB VANGUARD DIV APPR			
SCHWAB VANGUARD DIV APPR			
SSGA US GOVT CREDIT BOND INDEX			

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)
35,000		34,988	12
			0
288,973			288,973
1,499,975		1,100,615	399,360
7,000,475		5,004,224	1,996,251
22,009			22,009
255,450			255,450
2,999,975		2,955,308	44,667
9,062,061		6,904,825	2,157,236
328		328	0

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	
			12
			0
			288,973
			399,360
			1,996,251
			22,009
			255,450
			44,667
			2,157,236
			0

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)
PASSTHROUGH FROM SCH K-1 SSGA US GOVT CREDIT BOND INDEX			
WELLINGTON CTF DIH SALE OF UNITS			
PASSTHROUGH FROM SCH K-1 WELLINGTON CTF DIH			
WELLINGTON CTF DIH			
OCTAVIAN OFFSHORE			
LOOMIS SAYLES			
PASSTHROUGH FROM SCH K-1 LOOMIS SAYLES			
GARDNER RUSSO			
DODDINGTON GLOBAL			
PASSTHROUGH FROM SCH K-1 DODDINGTON GLOBAL			

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)
		21,555	-21,555
12,000,000		11,517,355	482,645
179,023			179,023
			0
1,010,487		974,657	35,830
104,208		104,208	0
33,843			33,843
76,039		77,431	-1,392
1,929,478		1,929,478	0
1,483,779			1,483,779

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	
			-21,555
			482,645
			179,023
			0
			35,830
			0
			33,843
			-1,392
			0
			1,483,779

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)
COLCHESTER			
PASSTHROUGH FROM SCH K-1 COLCHESTER			
COMMERCE TORTOISE			
PASSTHROUGH FROM MULTIPLE SCH K-1 COMMERCE TORTOISE			
COMMERCE TORTOISE SALE OF UNITS			

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)
			0
156,626			156,626
			0
		18,955	-18,955
601,755		592,070	9,685

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	
			0
			156,626
			0
			-18,955
			9,685

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(a) Name and address	**(b)** Title, and average hours per week devoted to position	**(c)** Compensation **(If not paid, enter -0-)**	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
HENRY W BLOCH 1 H R BLOCK WAY KANSAS CITY, MO 64105	CHAIRMAN & DIRECTOR 5 00	0	0	0
THOMAS M BLOCH 1 H R BLOCK WAY KANSAS CITY, MO 64105	VICE CHAIRMAN & DIRECTOR 5 00	0	0	0
ROBERT L BLOCH 1 H R BLOCK WAY KANSAS CITY, MO 64105	TREASURER & DIRECTOR 0 50	0	0	0
MARY JO BROWN 1 H R BLOCK WAY KANSAS CITY, MO 64105	ASSISTANT SECRETARY & DIRECTOR 0 50	0	0	0
BRUCE C DAVISON 1 H R BLOCK WAY KANSAS CITY, MO 64105	DIRECTOR 0 50	0	0	0
WILLIAM A HALL 1 H R BLOCK WAY KANSAS CITY, MO 64105	DIRECTOR 0 50	0	0	0
EDWARD T MATHENY JR 1 H R BLOCK WAY KANSAS CITY, MO 64105	DIRECTOR 0 50	0	0	0
MORTON I SOSLAND 1 H R BLOCK WAY KANSAS CITY, MO 64105	DIRECTOR 0 50	0	0	0
ELIZABETH A UHLMANN 1 H R BLOCK WAY KANSAS CITY, MO 64105	SECRETARY & DIRECTOR 0 50	0	0	0
EVAGELINE RICH 1 H R BLOCK WAY KANSAS CITY, MO 64105	ASSISTANT TREASURER 0 50	0	0	0
DAVID P MILES - SEE STMT 14 1 H R BLOCK WAY KANSAS CITY, MO 64105	PRESIDENT 35 00	149,605	16,395	0

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*				
ADHOC GROUP AGAINST CRIME 3116 PROSPECT KANSAS CITY, MO 64128		PC	FUNDS TO SUPPORT THE GUARDIAN AWARDS PROGRAM	7,500
ADMIRAL NIMITZ FOUNDATION 328 E MAIN ST FREDERICKSBURG, TX 78624		PC	GRANT FOR MATCH	250
ALZHEIMER'S ASSOCIATION - HEART OF AMERICA CHAPTER 3846 W 75TH ST PRAIRIE VILLAGE, KS 66208		PC	GRANT FOR MATCH	500
CHARLOTTE STREET FOUNDATION PO BOX 12063 KANSAS CITY, MO 64108		PC	GRANT FOR MATCH	1,330
CHILDREN'S MERCY HOSPITAL 2401 GILLHAM ROAD KANSAS CITY, MO 64108		PC	GRANT FOR MATCH	2,000
CHILDREN'S TLC 3101 MAIN STREET KANSAS CITY, MO 64111		PC	GRANT FOR MATCH	600
ENDOWMENT FUND FOR THE HENRY W BLOCH SCHOOL OF MANAGEMENT AT THE GKCF 1055 BROADWAY SUITE 130 KANSAS CITY, MO 64105		PC	FUNDS TO SUPPORT THE HENRY W BLOCH SCHOOL OF MANAGEMENT	4,500,000
FREMAR FOUNDATION FOR ACCORDION ARTS 2816 W 87TH TERRACE LEAWOOD, KS 66206		PC	GRANT FOR MATCH	340
FRIENDS OF UNIVERSITY ACADEMY 4049 PENNSYLVANIA STE 400 KANSAS CITY, MO 64111		PC	GRANT FOR MATCH	5,500
HARRIMAN-JEWELL SERIES 500 COLLEGE HILL LIBERTY, MO 64068		PC	GRANT FOR MATCH	2,000
HARRY S TRUMAN LIBRARY INSTITUTE FOR NATIONAL AND INTERNATIONAL AFFAIRS 500 W US HWY 24 INDEPENDENCE, MO 64050		PC	GRANT FOR MATCH	2,000
HYMAN BRAND HEBREW ACADEMY 5801 WEST 115TH STREET SUITE 102 OVERLAND PARK, KS 66211		PC	FUNDS TO SUPPORT ONGOING PROGRAMS AND OPERATIONS	90,000
HYMAN BRAND HEBREW ACADEMY 5801 WEST 115TH STREET SUITE 102 OVERLAND PARK, KS 66211		PC	GRANT FOR MATCH	2,000
JACKSON COUNTY HISTORICAL SOCIETY PO BOX 4241 INDEPENDENCE, MO 64051		PC	GRANT FOR MATCH	200
JEWISH COMMUNITY CENTER OF GREATER KANSAS CITY 5801 WEST 115TH STREET OVERLAND PARK, KS 662111800		PC	FUNDS TO SUPPORT ONGOING PROGRAMS AND OPERATIONS	30,000
Total . . . . ▶ **3a**				7,918,481

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*				
JEWISH COMMUNITY RELATIONS BUREAU-AMERICAN JEWISH COMMITTEE 5801 W 115TH ST SUITE 203 OVERLAND PARK, KS 66211		PC	FUNDS TO SUPPORT ONGOING PROGRAMS AND OPERATIONS	36,000
JEWISH FAMILY SERVICES 5801 W 115TH ST SUITE 103 OVERLAND PARK, KS 662111824		PC	FUNDS TO SUPPORT ONGOING PROGRAMS AND OPERATIONS	15,000
JEWISH FEDERATION OF GREATER KANSAS CITY 5801 W 115TH ST OVERLAND PARK, KS 66211		PC	FUNDS TO SUPPORT ONGOING PROGRAMS AND OPERATIONS	250,000
JEWISH FEDERATION OF GREATER KANSAS CITY 5801 W 115TH ST OVERLAND PARK, KS 66211		PC	GRANT FOR MATCH	3,330
KANSAS CITY PUBLIC LIBRARY 14 WEST 10TH ST KANSAS CITY, MO 64105		PC	GRANT FOR MATCH	2,000
KANSAS CITY REPERTORY THEATRE 4825 TROOST AVE STE 106 KANSAS CITY, MO 64110		PC	GRANT FOR MATCH	5,000
KAUFFMAN CENTER FOR THE PERFORMING ARTS 1601 BROADWAY KANSAS CITY, MO 64108		PC	GRANT FOR MATCH	2,500
KCPT- PUBLIC TELEVISION 19 125 E 31ST ST KANSAS CITY, MO 64108		PC	GRANT FOR MATCH	200
KU ENDOWMENT PO BOX 928 LAWRENCE, KS 66044		PC	GRANT FOR MATCH	500
LYRIC OPERA OF KANSAS CITY INC 1725 HOLMES KANSAS CITY, MO 64108		PC	GRANT FOR MATCH	1,665
MIDWEST CENTER FOR HOLOCAUST EDUCATION 5801 WEST 115TH STREET SUITE 106 OVERLAND PARK, KS 66211		PC	FUNDS TO SUPPORT ONGOING PROGRAMS AND OPERATIONS	5,000
MULTIPLE SCLEROSIS FOUNDATION 6520 N ANDREWS AVE FORT LAUDERDALE, FL 33309		PC	GRANT FOR MATCH	200
NAVY LEAGUE OF THE UNITED STATES 2300 WILSON BLVD ARLINGTON, VA 22201		PC	GRANT FOR MATCH	900
RENEWED JEWISH LEADERS 7894 TENNYSON CT BOCA RATON, FL 33433		PC	GRANT FOR MATCH	10,000
SAINT LUKE'S HOSPITAL FOUNDATION PO BOX 119000 KANSAS CITY, MO 64111		PC	GRANT FOR MATCH	2,000
Total . . . . ▶ **3a**				7,918,481

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*				
SAINT LUKE'S HOSPITAL FOUNDATION PO BOX 119000 KANSAS CITY, MO 64111		PC	FOR THE USE AND BENEFIT OF PROGRAMS OF THE SAINT LUKE'S MARION BLOCH NEUROSCIENCES INSTITUTE CONDUCTED AT THE HOSPITAL'S MAIN CAMPUS	2,400,000
SASONE COMMITTEE AT THE JEWISH FEDERATION OF GREATER KANSAS CITY 5801 WEST 115TH STREET OVERLAND PARK, KS 66211		PC	FUNDS TO SUPPORT ONGOING PROGRAMS AND OPERATIONS	10,000
THE NELSON GALLERY FOUNDATION 4525 OAK STREET KANSAS CITY, MO 64111		PC	GRANT FOR MATCH	31,880
THE NELSON GALLERY FOUNDATION 4525 OAK STREET KANSAS CITY, MO 64111		PC	FUNDS TO PRODUCE A VIDEO RECORDING OF HENRY BLOCH SHARING PERSONAL STORIES ABOUT THE ARTWORK IN THE BLOCH COLLECTION	25,000
THE NELSON GALLERY FOUNDATION 4525 OAK STREET KANSAS CITY, MO 64111		PC	FUNDS TO SUPPORT MEMBERSHIPS, SPONSORSHIPS, AND VIDEO INTERVIEWS OF HENRY BLOCH AND DAVID DOUGLAS DUNCAN FOR THE CALENDAR YEAR 2013	25,000
THE NELSON GALLERY FOUNDATION 4525 OAK STREET KANSAS CITY, MO 64111		PC	FUNDS TO SUPPORT MEMBERSHIPS AND SPONSORSHIPS DURING 2015	195,000
THE TEMPLE CONGREGATION B'NAI JEHUDAH 12320 NALL AVE OVERLAND PARK, KS 66209		PC	GRANT FOR MATCH	2,420
UMKC FOUNDATION 300B ADMINISTRATIVE CENTER 5100 ROCHKHILL ROAD KANSAS CITY, MO 64110		PC	GRANT FOR MATCH	54,000
UMKC FOUNDATION 300B ADMINISTRATIVE CENTER 5100 ROCHKHILL ROAD KANSAS CITY, MO 64110		PC	FUNDS TO SUPPORT THE 29TH ANNUAL ENTREPRENEUR OF THE YEAR AWARDS	15,000
UMKC FOUNDATION 300B ADMINISTRATIVE CENTER 5100 ROCHKHILL ROAD KANSAS CITY, MO 64110		PC	MILLER NICHOLS LIBRARY RENOVATION - PHASE IV	50,000
UNITED SERVICE ORGANIZATIONS 2111 WILSON BLVD STE 1200 ARLINGTON, VA 22201		PC	GRANT FOR MATCH	200
UNITED WAY OF GREATER KANSAS CITY 801 WEST 47TH STREET SUITE 500 KANSAS CITY, MO 64112		PC	TOCQUEVILLE SOCIETY SUPPORT 2014	25,000
UNITED WAY OF GREATER KANSAS CITY 801 WEST 47TH STREET SUITE 500 KANSAS CITY, MO 64112		PC	GRANT FOR MATCH	10,000
UNIVERSITY OF MISSOURI-COLUMBIA 109 REYNOLDS ALUMNI CENTER COLUMBIA, MO 65211		PC	GRANT FOR MATCH	6,300
VAAD HAKASHRUTH OF KANSAS CITY 9900 ANTIOCH OVERLAND PARK, KS 66212		PC	FUNDS TO SUPPORT ONGOING PROGRAMS AND OPERATIONS	2,000
Total . . . . ▶ **3a**				7,918,481

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*				
VILLAGE SHALOM INC 5500 W 123RD STREET OVERLAND PARK,KS 66209		PC	FUNDS TO SUPPORT ONGOING PROGRAMS AND OPERATIONS	12,000
WAYSIDE WAIFS INC 3901 MARTHA TRUMAN RD KANSAS CITY,MO 64137		PC	GRANT FOR MATCH	500
WOMEN'S EMPLOYMENT NETWORK 920 MAIN ST STE 100 KANSAS CITY,MO 64105		PC	GRANT FOR MATCH	666
YMCA OF GREATER KANSAS CITY 3100 BROADWAY SUITE 1020 KANSAS CITY,MO 64111		PC	RENOVATION AND EXPANSION OF THE LINWOOD YMCA	75,000
Total . . . . ▶ **3a**				7,918,481

TY 2014 Accounting Fees Schedule

Name: MARION AND HENRY BLOCH FAMILY FOUNDATION

EIN: 45-4047901

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING AND AUDIT FEES	38,715	30,972		7,743

TY 2014 General Explanation Attachment

Name: MARION AND HENRY BLOCH FAMILY FOUNDATION

EIN: 45-4047901

Identifier	Return Reference	Explanation
	FORM 990-PF, PART VIII, LINE 1, OFFICER COMPENSATION	THE FOUNDATION HAS NO EMPLOYEES ALL MANAGEMENT SERVICES ARE PROVIDED THROUGH HRB MANAGEMENT, INC WHO IS PAID A MANAGEMENT FEE AS DISCLOSED IN PART VIII, LINE 3, HIGHLY PAID CONTRACTORS OFFICER DAVID P MILES IS AN EMPLOYEE OF AND IS PAID BY HRB MANAGEMENT, INC PURSUANT TO THE FORM 990-PF INSTRUCTIONS, THE PORTION OF THE COMPENSATION PAID TO THE MANAGEMENT SERVICES COMPANY (HRB MANAGEMENT, INC) THAT RELATES TO SERVICES PROVIDED BY THE FOUNDATION OFFICER, DAVID P MILES, IS REPORTED IN PART VIII, LINE 1, OFFICER COMPENSATION AS IF THE FOUNDATION HAD PAID THE OFFICER DIRECTLY THE TOTAL AMOUNT PAID TO HRB MANAGEMENT, INC REPORTED IN PART VIII, LINE 3, HIGHLY PAID CONTRACTORS INCLUDES THE AMOUNT OF OFFICER COMPENSATION SEPARATELY REPORTED IN PART VIII, LINE 1, OFFICER COMPENSATION

TY 2014 Investments - Other Schedule

Name: MARION AND HENRY BLOCH FAMILY FOUNDATION

EIN: 45-4047901

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
WELLINGTON CTF DIH	FMV	10,570,815	10,570,815
LOOMIS SAYLES	FMV	11,701,645	11,701,645
SSGA - INTERMED US GOVT/CREDIT BOND	FMV	25,221,837	25,221,837
GRUSS GLOBAL INVESTORS	FMV	2,307,763	2,307,763
OCTAVIAN OFFSHORE FUND	FMV	574,245	574,245
FIR TREE INTL VALUE FUND	FMV	2,557,376	2,557,376
COVALENT CAPITAL PARTNERS	FMV	2,608,171	2,608,171
MASON CAPITAL LTD	FMV	1,983,107	1,983,107
COMMERCE BONDS	FMV	5,948,733	5,948,733
SCHWAB - DFA EMERGING MKTS	FMV	9,916,752	9,916,752
SCHWAB - VANGUARD DEVELOPED MKTS	FMV	41,255,227	41,255,227
SCHWAB - VANGUARD DIV APPR	FMV	8,269,580	8,269,580
SCHWAB - VANGUARD RUSSELL 3000	FMV	43,858,458	43,858,458
SCHWAB - FIRST PACIFIC ADVISORS	FMV	9,162,779	9,162,779
SCHWAB - VANGUARD EMERGING MARKETS	FMV	7,944,338	7,944,338
SCHWAB - TEMPLETON GLOBAL	FMV	12,913,291	12,913,291
SCHWAB - LAZARD	FMV	6,556,948	6,556,948
GARDNER RUSSO	FMV	16,201,427	16,201,427
DODDINGTON GLOBAL FUND	FMV	15,527,820	15,527,820
WINGATE PARTNERS	FMV	1,257,226	1,257,226
COLCHESTER	FMV	12,307,864	12,307,864
OAKWOOD REAL ESTATE PARTNERS	FMV	1,334,647	1,334,647
CID CAPITAL II	FMV	385,249	385,249
COMMERCE TORTOISE	FMV	6,156,614	6,156,614

TY 2014 Legal Fees Schedule

Name: MARION AND HENRY BLOCH FAMILY FOUNDATION

EIN: 45-4047901

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	16,041	4,010		12,031

TY 2014 Other Assets Schedule

Name: MARION AND HENRY BLOCH FAMILY FOUNDATION

EIN: 45-4047901

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
INTEREST RECEIVABLE	33,658	0	0

TY 2014 Other Expenses Schedule

Name: MARION AND HENRY BLOCH FAMILY FOUNDATION

EIN: 45-4047901

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INFORMATION TECHNOLOGY	7,689	0		7,689
SPECIAL EVENT EXPENSE	1,585	0		1,585
INSURANCE	7,080	0		0
MISCELLANEOUS	12,156	608		11,548

TY 2014 Other Income Schedule

Name: MARION AND HENRY BLOCH FAMILY FOUNDATION

EIN: 45-4047901

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
INCOME (LOSS) FROM PASSTHROUGHS	-2,510	253,788	-2,510
UNREALIZED GAIN (LOSS) ON INVESTMENTS	-7,460,586		-7,460,586

TY 2014 Other Liabilities Schedule

Name: MARION AND HENRY BLOCH FAMILY FOUNDATION

EIN: 45-4047901

Description	Beginning of Year - Book Value	End of Year - Book Value
DUE TO HRB MANAGEMENT, INC.	5,737	25,650

TY 2014 Other Professional Fees Schedule

Name: MARION AND HENRY BLOCH FAMILY FOUNDATION

EIN: 45-4047901

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT ADVISOR AND SERVICE FEES	966,376	637,249		0
MANAGEMENT FEES	287,688	43,153		244,535
CONSULTING FEES	21,058	1,053		20,005
LEGACY EXPENSES	321,205	0		321,205

TY 2014 Taxes Schedule

Name: MARION AND HENRY BLOCH FAMILY FOUNDATION

EIN: 45-4047901

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXCISE TAXES	50,052	0		0
FOREIGN TAXES	32,240	32,240		0

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Schedule B
(Form 990, 990-EZ, or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ **Attach to Form 990, 990-EZ, or 990-PF.**
▶ **Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at *www.irs.gov/form990*.**

OMB No 1545-0047

2014

Name of the organization	Employer identification number
MARION AND HENRY BLOCH FAMILY FOUNDATION	45-4047901

Organization type (check one)

Filers of:	**Section:**
Form 990 or 990-EZ	☐ 501(c)( ) (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
	☐ 527 political organization
Form 990-PF	☑ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule.**
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions

General Rule

☑ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling $5,000 or more (in money or other property) from any one contributor Complete Parts I and II See instructions for determining a contributor's total contributions

Special Rules

☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** $5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and II

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than $1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals Complete Parts I, II, and III

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc , purposes, but no such contributions totaled more than $1,000 If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc , purpose Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc , contributions totaling $5,000 or more during the year . . . . ▶ $ ____________

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

Name of organization
MARION AND HENRY BLOCH FAMILY FOUNDATION

Employer identification number
45-4047901

Part I **Contributors** (see instructions) Use duplicate copies of Part I if additional space is needed

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	MARION HENRY BLOCH 6400 WENONGA TERRACE SHAWNEE MISSION, KS66205	$ 5,000,000	Person ☐ Payroll ☐ Noncash ☑ (Complete Part II for noncash contributions)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)

Name of organization
MARION AND HENRY BLOCH FAMILY FOUNDATION

Employer identification number
45-4047901

Part II **Noncash Property** (see instructions) Use duplicate copies of Part II if additional space is needed

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	COMMERCE BONDS	$ 5,000,000	2014-12-31
		$	
		$	
		$	
		$	
		$	

Name of organization	**Employer identification number**
MARION AND HENRY BLOCH FAMILY FOUNDATION	45-4047901

Part III ***Exclusively* religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than $1,000 for the year from any one contributor.** Complete columns **(a)** through **(e) and** the following line entry For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc , contributions of **$1,000 or less** for the year (Enter this information once See instructions) ▶ $ ____________
Use duplicate copies of Part III if additional space is needed

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift	
Transferee's name, address, and ZIP 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift	
Transferee's name, address, and ZIP 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift	
Transferee's name, address, and ZIP 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift	
Transferee's name, address, and ZIP 4	Relationship of transferor to transferee