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Form **99Q-PF**

Return of Private Foundation 2015

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.

OMB No 1545-0052 **2014**Open to Public Inspection

Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf. For calendar year 2014 or tax year beginning , and ending Name of foundation A Employer identification number HUGEL FOUNDATION 51-0206704 Number and street (or P O box number if mail is not delivered to street address) Room/suite **B** Telephone number 2626 N. ARNOULT 300 504-883-2600 City or town, state or province, country, and ZIP or foreign postal code C If exemption application is pending, check here METAIRIE, LA 70002 Initial return Initial return of a former public charity G Check all that apply: D 1 Foreign organizations, check here Final return X Amended return Foreign organizations meeting the 85% test, check here and attach computation Address change Name change H Check type of organization: X Section 501(c)(3) exempt private foundation E If private foundation status was terminated Section 4947(a)(1) nonexempt charitable trust _____ Other taxable private foundation under section 507(b)(1)(A), check here I Fair market value of all assets at end of year J Accounting method: X Cash Accruat If the foundation is in a 60-month termination (from Part II, col. (c), line 16) Other (specify) under section 507(b)(1)(B), check here 1,302,460. (Part I, column (d) must be on cash basis) ▶\$ Analysis of Revenue and Expenses Part I (d) Disbursements (a) Revenue and (b) Net investment (c) Adjusted net (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a)) for charitable purposes expenses per books income income (cash basis only) N/A Contributions, gifts, grants, etc., received Check If the foundation is not required to attach Sch. B Interest on savings and temporary cash investments 23,883 23,883 STATEMENT 4 Dividends and interest from securities 5a Gross rents b Net rental income or (loss) 274,386 6a Net gain or (loss) from sale of assets not on line 10 b Gross sales price for all assets on line 6a 749,648. 274,386 Capital gain net income (from Part IV, line 2) Net short-term capital gain Income modifications 10a Gross sales less returns and allowances b Less Cost of goods sold c Gross profit or (loss) 11 Other income 298,269 298,269 Total Add lines 1 through 11 0. Compensation of officers, directors, trustees, etc 14 Other employee salaries and wages 15 Pension plans, employee benefits 16a Legal fees 2,525 STMT 2 0. 0. **b** Accounting fees c Other professional fees 17 Interest STMT 3 883. 0. 883-18 Taxes 19 Depreciation and depletion 20 Occupancy 21 Travel, conferences, and meetings 22 Printing and publications STMT 4 100 100 23 Other expenses 0. OGDEN Operatir 24 Total operating and administrative 3,508 983 0. expenses. Add lines 13 through 23 55,257 55,257. 25 Contributions, gifts, grants paid 26 Total expenses and disbursements. 58,765 983 55,257. Add lines 24 and 25 27 Subtract line 26 from line 12: 239,504 a Excess of revenue over expenses and disbursements 297,286 b Net investment income (if negative, enter -0-) N/A c Adjusted net income (if negative, enter -0-)

| For | m 99 | 00-PF (2014) HUGEL FOUNDATION | | 51-0 | 0206704 Page 2 |
|-----------------------------|------------|--|--------------------|----------------|-----------------------|
| Г | art | Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only | Beginning of year | End of | |
| ᄕ | <u>arı</u> | column should be for end-of-year amounts only | (a) Book Value | (b) Book Value | (c) Fair Market Value |
| | 1 | Cash - non-interest-bearing | 106,637. | 153,712. | 153,712. |
| | 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 | | _ | |
| | 7 | Other notes and loans receivable | | | |
| | | Less: allowance for doubtful accounts ▶ | | | |
| s | 8 | Inventories for sale or use | | | |
| se | 9 | Prepaid expenses and deferred charges | | | |
| Assets | 10a | Investments - U.S. and state government obligations | | | |
| | b | Investments - corporate stock | | | |
| | С | Investments - corporate bonds | | | |
| | 11 | Investments - land, buildings, and equipment basis | | | |
| | | Less accumulated depreciation | | | |
| | 12 | Investments - mortgage loans | | | |
| | 13 | Investments - other STMT 5 | 985,497. | 1,177,926. | 1,148,748. |
| | 14 | Land, buildings, and equipment: basis ▶ | • | | |
| | | Less accumulated depreciation | | | |
| | 15 | Other assets (describe ► | | | |
| | I . | Total assets (to be completed by all filers - see the | | | |
| | | instructions. Also, see page 1, item I) | 1,092,134. | 1,331,638. | 1,302,460. |
| S | 17 | Accounts payable and accrued expenses | | | |
| | 18 | Grants payable | | | |
| | 19 | Deferred revenue | | | |
| Liabilities | 20 | Loans from officers, directors, trustees, and other disqualified persons | | | |
| abi | 21 | Mortgages and other notes payable | | | |
| _ | 22 | Other liabilities (describe) | | | |
| | | | | | |
| | 23 | Total liabilities (add lines 17 through 22) | 0. | 0. | |
| | | Foundations that follow SFAS 117, check here | | | |
| | | and complete lines 24 through 26 and lines 30 and 31 | | | |
| ces | 24 | Unrestricted | | | |
| <u>a</u> | 25 | Temporarily restricted | | | |
| Ва | 26 | Permanently restricted | | | |
| Net Assets or Fund Balances | | Foundations that do not follow SFAS 117, check here | | | |
| Ę | | and complete lines 27 through 31. | | | |
| 80 | 27 | Capital stock, trust principal, or current funds | 1,092,134. | 1,331,638. | |
| set | 28 | Paid-in or capital surplus, or land, bldg., and equipment fund | 0. | 0. | |
| As | 29 | Retained earnings, accumulated income, endowment, or other funds | 0. | 0. | |
| Š | 30 | Total net assets or fund balances | 1,092,134. | 1,331,638. | |
| | | | | | |
| _ | 31 | Total liabilities and net assets/fund balances | 1,092,134. | 1,331,638. | |
| | art | III Analysis of Changes in Net Assets or Fund B | alances | | |
| _ | | | <u>.</u> | | |
| 1 | | I net assets or fund balances at beginning of year - Part II, column (a), line | 30 | 1 | 4 000 101 |
| | • | st agree with end-of-year figure reported on prior year's return) | | 1 | 1,092,134. |
| | | r amount from Part I, line 27a | | 2 | 239,504. |
| | | er increases not included in line 2 (itemize) | | 3 | 0. |
| | | lines 1, 2, and 3 | | 4 | 1,331,638. |
| | | reases not included in line 2 (itemize) | | 5 | 0. |
| <u>6</u> | Tota | I net assets or fund balances at end of year (line 4 minus line 5) - Part II, co | olumn (b), line 30 | 6 | 1,331,638. |

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.

Form **990-PF** (2014)

2,973.

56,980.

55,257.

6

7

7 Add lines 5 and 6

Enter 1% of net investment income (1% of Part I, line 27b)

Enter qualifying distributions from Part XII, line 4

15131107 781090 023811

| | n 990-PF (2014) HUGEL FOUNDATION art VI 'Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4 | 51- 948 | 0206 - see i | 704 instru | ction | Page 4 1 S) |
|----|--|------------|------------------------|---------------|------------|-----------------------|
| 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% | 1 | <u></u> | | <u>5,9</u> | <u>46.</u> |
| | of Part I, line 27b | | | | | |
| | 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 | | | | <u>0.</u> |
| 3 | Add lines 1 and 2 | 3 | | | 5,9 | |
| | Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) | 4 | | | | <u>0.</u> |
| | Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- | 5 | | | 5,9 | <u>46.</u> |
| | Credits/Payments: | | | | | |
| | 2014 estimated tax payments and 2013 overpayment credited to 2014 6a 2,973. | | | | | |
| | Exempt foreign organizations - tax withheld at source | | | | | |
| | Tax paid with application for extension of time to file (Form 8868) | ' | | | | |
| | Backup withholding erroneously withheld | | | | | |
| | Total credits and payments. Add lines 6a through 6d | 7 | | | <u>2,9</u> | <u>73.</u> |
| | Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached | 8 | | | | |
| | Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed | 9 | | | 2,9 | <u>73.</u> |
| | Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid | 10 | ļ | | | |
| | Enter the amount of line 10 to be: Credited to 2015 estimated tax | 11 | | | | |
| | art VII-A Statements Regarding Activities | | | . | | |
| 1a | During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene | ın | | | Yes | |
| | any political campaign? | | | 1a | | <u>X</u> |
| b | Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition | | | 1b | | <u>X</u> |
| | If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published | ed or | | | 1 | |
| | distributed by the foundation in connection with the activities | | | | | |
| | Did the foundation file Form 1120-POL for this year? | | | 10 | | X |
| d | Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: | | | | | |
| | (1) On the foundation. \blacktriangleright \$ 0. (2) On foundation managers. \blacktriangleright \$ 0. | | | | | |
| е | 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? | | | 2 | | _X_ |
| | If "Yes," attach a detailed description of the activities. | | | | | |
| 3 | Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, of | r | | | | |
| | bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes | | | 3 | | <u>X</u> |
| | Did the foundation have unrelated business gross income of \$1,000 or more during the year? | | | 4a | | _X_ |
| | olf "Yes," has it filed a tax return on Form 990-T for this year? | N | I/A | 4b | | |
| 5 | Was there a liquidation, termination, dissolution, or substantial contraction during the year? | | | 5 | | <u>X</u> |
| | If "Yes," attach the statement required by General Instruction T | | | | | |
| 6 | Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: | | | | | i |
| | 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 | | | | l |
| | remain in the governing instrument? | | | 6 | X | |
| 7 | Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV | , | | 7 | Х | — |
| _ | Calculate the state of the foundation areas, and the first transfer of the state of | | | | | |
| 88 | a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ | | | | | |
| | LA | | | | | |
| t | of the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) | | | ۵. | . | |
| _ | of each state as required by General Instruction G? If "No," attach explanation | | | 8b | X | |
| 9 | Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for cale | ndar | | | | v |
| 46 | year 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)? If "Yes," complete Part XIV | | | 9 | | X |
| 10 | Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses | | | 10 000 | | |
| | | | For | m 990 | -rr (| ∠∪14) |

| 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) 12. Dut the foundation make a distribution is a donor advantaged at lind over which the foundation or a dequalified person had advisory privileges? 13. Yes, attach statement (see instructions) 14. X. 15. Dut the foundation comply with the bubblic inspection requirements for its annual returns and exemption application? Website address ➤ N/A 16. The books are on carro of ▶ PHIL MULLINS 17. The books are on carro of ▶ PHIL MULLINS 17. The books are on carro of ▶ PHIL MULLINS 18. Section 4847(3)(1) moresempt charatise trusts fining from 990+Pr in file of Form 941-Check here and enter the amount of it as-exempt interest recoved or accrued during the year 16. A any time during clandaria year 2014, did the foundation have an interest in oral suprairies or other attitionity over a bank, so social francial account in a foreign country? 18. Set in instructions for exceptions and filing requirements for FinCEN Form 114, (formerly TD F 99-22.1), if Yes, institute in a filing francial account in a foreign country? 18. In the statements Regarding Activities for Which Form 4720 May Be Required 19. File Form 4720 if any item its checked in the "Yes" column, unless an exception applies. 19. During the year did the foundation (either directly or indeedby); 10. (Finges in the size or exchange, or lessing of prompets with a disqualified person? 10. Experiments and the size or exchange, or lessing of prompets with a disqualified person? 11. Finges in the size or exchange, or lessing of prompets with a disqualified person? 12. Yes IX No 13. Finansh goods, services, or facilities to (or accept them form) a disqualified person? 14. Yes IX No 16. Finansh gray money or grouperty to a government official Prompet in Check Yer 18. If the year any income or essatis to a disqualified person? 19. Yes IX No 19. The year any income or | | 990-PF (2014) HUGEL FOUNDATION Int VII-A Statements Regarding Activities (continued) | 51-0206 | 70 <u>4</u> | | Page 5 |
|---|----|---|--------------------|-------------|------------|---------------|
| section 12(2)(13)? If Yes, attach schedule (see instructions) 10 did the foundation make a dischilation to a donn a divised fund over which the foundation or a disgualified person had advisory privileges? If Yes, attach statement (see instructions) 10 did the foundation comply with the public inspection requirements for its animal returns and exemption application? 11 The books are in care of PHTL MULLINS 12 Experiments PATL MULLINS 13 Experiments PATL MULLINS 14 The books are in care of PHTL MULLINS 15 Section 4947(a)(1) nonexempt charitable trusts filing from 990-FF in lieu of form 1041- Check here and either the amount of tax-exempts interest received on accured during the year 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 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 At any time did in 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 At any time did in the foundation have an interest in or a signature or other authority over a bank, securities, or chemically in the securities, or chemically in the securities of the foundation have an interest in or a signature or other authority over a bank, securities, or chemically in the securities, or chemically in the securities of the foundation have an interest in or a signature or other authority over a bank, securities, or chemically in the securities of the condition of the | | | | | | |
| 12 Did the foundation make a distribution to a direct driver which the foundation or a disqualified person had advisory privileges? 13 Did the foundation comply with the bublic inspection requirements for its annual returns and exemption application? Without address ► N/A The buboks are one or or ► PHIL MULLINS Located at ► 26.26 N. ARNOULT, SUITE 3.00, METAIRIE, LA Telephone no. ► 50.4-88.3-26.00 Section 4847(91) the measured trainable trusts filting 7 mm 90.9FF in like of From 1941 - Check here and eater the amount of tax-exempt interest received or accreased during the year After a manual received or accreased during the year After a manual received or accreased during the year After a manual received or accreased during the year After a manual received or accreased during the year After a manual received or accreased or accreased during the year After a manual received or accreased or accreased during the year After a manual received or accreased or accreased during the year After a manual received or accreased or accreased during the year After a manual received or accreased or accreased during the year After a manual received or accreased or accreased during the year After a manual received or accreased or accreased during the year After a manual received or accreased or accreased and the second or accreased to the formation of the formation or accreased or acc | •• | | | 11 | 1 | х |
| If Yes, attach statement (see instructions) 10 dit foe foundation comply with the public inspection requirements for its annual returns and exemption application? 11 The books are in care of ▶ PHTL MULLINS 12 Telephone no. ▶ 50.4 − 88.3 − 26.00 15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990PF in lieu of Form 1041 - Check here and enter the annual of tax-evenity interest received on accreated furnity they year 16 A lary time during calendar year 2014, do the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114, (formerly TD F 90-22.1), if Yes,* enter the name of the foreign country. 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. 19 Juming they say did the foundation (leath directly or indirectly): (1) Engage in the sale or exchange, or lessing of property with a disqualited person? (2) Borrow money from, lend money to, or otherwise extend dredit of cracepit it form) a disqualited person? (3) Furnish goods, services, or facilities to (via cacepit them from) a disqualited person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualited person? (5) Transfer any income or assists to a disqualitied person (or make any of either available for the benefit or use of a disqualitied person (or make any of either available for the benefit or use of a disqualitied person (or make any of either available for the benefit or use of a disqualitied person (or make any of either available for the benefit or use of a disqualitied person (or make any of either available for the benefit or use of a disqualitied person (or make any of either available for the benefit or use of a disqualitied person (or or see play the use of the distrust the money of the distrust the money of the distrust the money o | 12 | | privileges? | | | |
| 13 | - | | | 12 | | X |
| 14. The books are in care of ▶ PHIL MULLINS Located at № 2626 N. ARNOULT, SUITE 300, METAIRE, LA 21P+4 ▶70002 15 Section 4947(a)(1) nonexempt charitable trusts fining form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year and enter the amount of tax-exempt interest received or accrued during the year of the fundation form of the desire of the fundation form of the years form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year of the fundation form of the fundation have an interest in or a signature or other authority over a bank, Yeas No securities, or other fundacion and fundation have an interest in or a signature or other authority over a bank, Yeas No securities, or other fundacion and fundation have an interest in or a signature or other authority over a bank, Yeas No securities, or other fundacion and fundation for the fundation form of the fundation (either directly or indirectly): 1 Single method of the fundation form of the fundation form of directly or indirectly): 1 Single method of the fundation form of the fundation for directly or indirectly): 1 Single method of the fundation of the fundation form of the fundation form of the fundation of the fundation form of the fundation form of the fundation form of the fundation for or remotives the expenses of a disqualified person? 2 Single method of the fundation of paym or remotives the expenses of a disqualified person? 3 A single fundation of government approximation form of expenses of a disqualified person? 4 Single fundation of paym one or property to a government official? (Exception Check No' of the fundation of paym one or property to a government official? (Exception Check No' of the fundation of paym one or property to a government official? (Exception Check No' of the fundation of paym one or property to a govern | 13 | Did the foundation comply with the public inspection requirements for its annual returns and exemption application? | | 13 | X | |
| Located at № 2626 N. ARNOULP, SUTTE 300, METATRIE, LA 3P-4 ▶70002 Section 4947(a) (1) nonexempt charatele trusts filing form 990-PF in lieu of Form 1041 - Check hore and enter the amount of tax-exempt interest received or accreed during the year 16. All any time during calendar year 2014, did the foundation have an interest in or a signature or other authority over a bank, see the instructions for exceptions and filing requirements for FinCEN Form 114, (formerly TD F 90:22.1), If Yes, enter the name of the foreign country. ▶ 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. 1 a 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 movely from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? Yes X No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes X No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualited person? Yes X No (5) Transfer any income or assets to a disqualided person of contact any income or assets to a disqualided person of contact any income or assets to a disqualided person of contact any income or assets to a disqualided person of contact any income or assets to a disqualided person of contact any income or assets to a disqualided person of contact any income or assets to a disqualided person of contact any income or assets to a disqualided person of contact any income or assets to a disqualided person of contact any income or assets to a disqualided person of contact any income or assets to a disqualided person of contact any income or assets to a disqualided person of contact any income or assets to a disqualided person of contact any income or assets to a disqualided person of contact any income or assets to a d | | Website address ► N/A | | | | |
| 15 Section 4947(a)(1) nonexempt charitable trusts tiling Form 990-PF in lieu of Form 1041 - Check here and either the amount of tax-exempt interest received or accrued during the year 16. At any time during calendar year 2014, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and fining requirements for FinCEN Form 114, (formerly TD F 90:22.1), 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. 19 Degree of the foundation (either directly or indirectly); 10 Engage in the sale or exchange, or leasing of looperly with a disqualified person? 11 Diring the year did the foundation (either directly or indirectly); 12 Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? 13 Furmish goods, services, or facilities to (or accept them from) a dequalified person? 14 Pay compensation to, or pay or reimburse the expenses of, a disqualified person? 15 Transfer any incomer or assets to adequalified person (Person) 16 Pay compensation to, or pay or reimburse the expenses of, a disqualified person? 17 Engage any incomer or assets to adequalified person (Person) 18 Iman yanswer in Yes' to 16 It [1-6], did any of the acts fall to qualify under the exceptions described in Regulations section 53.494 I(d)-3 or in a current notice regarding disaster assistance (see instructions)? 18 Iman yanswer in Yes' to 16 It [1-6], did any of the acts falls to qualify under the exceptions described in Regulations section 4942(a)(3) or 4942(a)(3) or 4942(a)(5) in a kine and fall asy year 2014, did the foundation have any undistributed income? (In sphlying section 4942(a)(2) (relating to morrect valuation of assets) to the year's undistributed income? (If applying the provisions of section | 14 | | | | <u>600</u> | |
| and enter the amount of tax-exempt interest received or accured during the year 16 At any time during calendar year 2014, did the foundation have an interest in or a signature or other authority over a bank, so cruitries, or other financial account in a foreign country? 18 Set the instructions for exceptions and filing requirements for FinCEN Form 114, (formerly TD F 90-22.1), If "Yes," enter the name of the foreign country! ▶ 18 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. 1 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? 1 Yes No 2 Borrow monay from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? 3 Furnish goods, services, or facilities to (or accept them from) a disqualified person? 4 Pay compensation to, or pay or reimburs in the expenses of, a disqualified person? 4 Pay compensation to, or pay or reimburs in the expenses of, a disqualified person? 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 (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or benefit or see of a disqualified person or the property to a government office of the property to a government office of the property of the property to a government office or benefit or see of a disqualified person or the property of the | | | ZIP+4 ► 700 | 002 | | |
| No securities, or other financial account in a foreign country? See the instructions for exceptions and filting requirements for FinCEN Form 114, (formerly TD F 90-22.1), It "Yes," enter the name of the foreign country. File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 1 During the year dot the foundation (either directly or indirectly)? 1 Engage in the sale or exchange, or lessing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any inciner or assets to a disqualified person (or make any of other available for the benefit or use of a disqualified person) described person (or make any incredit to (or accept them from) a disqualified person (or make any incredit to (or accept them from) a disqualified person? (6) Agree to pay money or property to a government official? (Exception Check 'No' if the toundation agreed to make a grant to or to employ the official for a period after termination of government service, it termination within 90 days.) It all any answer is "ves" to 141/6, (b) dut any of the acts fails to qualify under the exceptions described in Regulations section 53.4941 (d)-3 or in a current notice regarding disaster assistance (see instructions)? N/A Ib I at the end of tax year 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? If "kes," list the years less of a 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 site with the foundation have any undistributed income (lines 6d and 6e | 15 | | 1 1 | | /3▶ | Ш |
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| If the foundation agreed to make a grant to or to employ the official for a period after terrimitation of government service, if terrimitating within 90 days.) If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here 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? 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(i)(3) or 4942(i)(5)): a At the end of tax year 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? If "Yes," its the years \[\subset \] 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.) If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. If the provisions of section 4943(a)(2) are being applied to any of the years listed in 2a, list the years here. If the provisions of section 4943(a)(b) 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) Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purp | | | | | | |
| termination of government service, if terminating within 90 days.) b if any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here 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? 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(i)(3) or 4942(i)(5)): a At the end of tax year 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? If "Yes," list the years Yes X No If "Yes," list the years Yes X No If "Yes," list the years sundistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. Yes X No If "Yes," did it have excess business holdings in 2014 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2014) N/A 4a 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? | | | | | | |
| b if any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941 (d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here 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? Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(i)(3) or 4942(i)(5)); At the end of tax year 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? If "Yes," list the years 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.) If "Yes," did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? If yes," did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? 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) Ab 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 j | | | es X No | | | |
| section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here 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? 2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)): a At the end of tax year 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? If "Yes," list the years 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.) If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. If the provisions of 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) And Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? By Did the foundation make any investment in a prior year (but after De | t | | | | | |
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| before the first day of the tax year beginning in 2014? 2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)): a At the end of tax year 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? If "Yes," list the years \ | | Organizations relying on a current notice regarding disaster assistance check here | ▶□ | | | |
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| defined in section 4942(j)(3) or 4942(j)(5)): a At the end of tax year 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? If "Yes," list the years \[\] | | | | 1c | | <u>X</u> |
| a At the end of tax year 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? If "Yes," list the years \[\] | 2 | | | | | |
| before 2014? If "Yes," list the years \ | | | | | | |
| 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 a II years listed, answer "No" and attach statement - see instructions.) c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. b | ä | | | | | |
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| statement - see instructions.) c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. | ١ | | | | | |
| c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. | | | | 2b | | |
| 3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? 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) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4a X b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2014? X | | • | · | | | |
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| b If "Yes," did it have excess business holdings in 2014 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2014) N/A Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 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? X | 3 | a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time | | | | |
| 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) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2014? 4b X | | | | | | |
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| Form 4720, to determine if the foundation had excess business holdings in 2014) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4a X b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2014? 4b X | | | | | | |
| 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?4aXb 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?4bX | | | | | | |
| b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2014? 4b X | | | N/A | | | |
| had not been removed from jeopardy before the first day of the tax year beginning in 2014? 4b X | | | no that | 4a | | |
| | l | | se mai | 4h | | v |
| | | nau not been removed nom jeopardy before the mot day of the tax year beginning in 20147 | For | |)-PF | |

| Form 990-PF (2014) HUGEL FOUNDATION Part VII-B Statements Regarding Activities for Which I | Form 4720 May Be | Required (control | 51-02067 | 04 | Page 6 |
|--|---|-----------------------------|--|---------------------------------------|--|
| 5a During the year did the foundation pay or incur any amount to: | OTHI TIZO HIAY DE | i ioquii eu (contin | ueu) | | |
| (1) Carry on propaganda, or otherwise attempt to influence legislation (section | n 4945(e))? | ☐ Ye | es X No | | |
| (2) Influence the outcome of any specific public election (see section 4955); of | ` '' | | | | |
| any voter registration drive? | • , • | Ye | s X No | | |
| (3) Provide a grant to an individual for travel, study, or other similar purposes | ? | Ye | s X No | | |
| (4) Provide a grant to an organization other than a charitable, etc., organizatio | n described in section | | | | |
| 4945(d)(4)(A)? (see instructions) | | Ye | es 🗶 No | | |
| (5) Provide for any purpose other than religious, charitable, scientific, literary, | or educational purposes, or | | | | 1 |
| the prevention of cruelty to children or animals? | | Ye | es 🗶 No | | |
| b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify uni | der the exceptions described | ın Regulatıons | | | |
| section 53.4945 or in a current notice regarding disaster assistance (see instru | ictions)? | | N/A | 5b | ļ |
| Organizations relying on a current notice regarding disaster assistance check h | iere | | ▶∟」 | | |
| c If the answer is "Yes" to question 5a(4), does the foundation claim exemption f | | | | | |
| expenditure responsibility for the grant? | | 1/A Ye | s L No | | |
| If "Yes," attach the statement required by Regulations section 53 494 | | | | | |
| 6a Did the foundation, during the year, receive any funds, directly or indirectly, to | pay premiums on | | | | |
| a personal benefit contract? | | Y6 | s X No | | |
| b Did the foundation, during the year, pay premiums, directly or indirectly, on a p | ersonal benefit contract? | | _ | 6b | <u> </u> |
| If "Yes" to 6b, file Form 8870 | | | | | |
| 7a At any time during the tax year, was the foundation a party to a prohibited tax s | | Y€ | s X No | | <u> </u> |
| b If "Yes," did the foundation receive any proceeds or have any net income attributed Part VIII Information About Officers, Directors, Trust | | manaya Uinbl | | 7b | |
| Part VIII Information About Officers, Directors, Trust Paid Employees, and Contractors | ees, roundation ivid | anagers, nigniy | , | | |
| 1 List all officers, directors, trustees, foundation managers and their | compensation. | | | · · · · · · · · · · · · · · · · · · · | |
| · · · · · · · · · · · · · · · · · · · | (b) Title, and average | (c) Compensation | (d) Contributions to employee benefit plans and deferred | (e) Ex | pense |
| (a) Name and address | hours per week devoted to position | (If not paid, enter -0-) | and deferred compensation | accoun allowa | t, other |
| DIETER M. HUGEL | PRESIDENT | Citter o j | compensation | unom | |
| 2626 N. ARNOULT | 1125252112 | | | | |
| METAIRIE, LA 70002 | 1.00 | 0. | 0. | | 0. |
| DALE C. HIGGINS | SEC/TREAS. | | | | |
| 2626 N. ARNOULT | | | | ļ | |
| METAIRIE, LA 70002 | 1.00 | 0. | 0. | | 0. |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| 2 Compensation of five highest-paid employees (other than those inc | | , enter "NONE." | (d) Contributions to | I | |
| (a) Name and address of each employee paid more than \$50,000 | (b) Title, and average hours per week devoted to position | (c) Compensation | employee benefit plans and deferred | (e) Ex accoun | pense t, other |
| | devoted to position | , | compensation | allowa | ances |
| NONE | | | | | |
| | | | | | |
| | - | | | | |
| | | | | | |
| | | | | | |
| | | | - | | |
| | { | | | | |
| | | 1 | | | |
| | 1 | | | | |
| Total number of other employees paid over \$50,000 | <u> </u> | | | J | 0 |

| Form 990-PF (2014) HUGEL FOUNDATION | | 206704 Page 7 |
|--|---|------------------|
| Part VIII Information About Officers, Directors, Trustees, Founda Paid Employees, and Contractors (continued) | tion Managers, Highly | |
| 3 Five highest-paid independent contractors for professional services. If none, enter | "NONE." | |
| (a) Name and address of each person paid more than \$50,000 | (b) Type of service | (c) Compensation |
| NONE | | |
| | | |
| | | |
| | | |
| Total number of others receiving over \$50,000 for professional services Part IX-A Summary of Direct Charitable Activities | | <u>▶</u> 0 |
| List the foundation's four largest direct charitable activities during the tax year. Include relevant statist number of organizations and other beneficiaries served, conferences convened, research papers prod | ical information such as the uced, etc. | Expenses |
| 1N/A | | |
| 2 | | |
| 3 | | |
| 4 | | |
| Part IX-B Summary of Program-Related Investments | | |
| Describe the two largest program-related investments made by the foundation during the tax year on | lines 1 and 2. | Amount |
| 1 <u>N/A</u> | | |
| 2 | | |
| All other program-related investments. See instructions. 3 | | |
| Total. Add lines 1 through 3 | > | 0. |

| Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes: a Average monthly fair market value of securities 1a | 1,091,610. 192,233. 80,424. |
|--|-----------------------------------|
| | 192,233. 80,424. |
| h. Average of monthly such halance | 192,233. 80,424. |
| b Average of monthly cash balances 1b | 80,424. |
| c Fair market value of all other assets | 4 0 4 4 4 4 |
| d Total (add lines 1a, b, and c) | 1,364,267. |
| e Reduction claimed for blockage or other factors reported on lines 1a and | |
| 1c (attach detailed explanation) 1e 0 . | |
| Acquisition indebtedness applicable to line 1 assets | 0. |
| Subtract line 2 from line 1d | 1,364,267. |
| Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions) | 20,464. |
| Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4 | 1,343,803. |
| Minimum investment return. Enter 5% of line 5 | 67,190. |
| 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.) | |
| | 67,190. |
| Minimum investment return from Part X, line 6 a Tax on investment income for 2014 from Part VI, line 5 2a 5,946. | 6/,190. |
| | |
| b Income tax for 2014. (This does not include the tax from Part VI.) 2b | E 046 |
| c Add lines 2a and 2b 2c 2c | 5,946. 61,244. |
| Distributable amount before adjustments. Subtract line 2c from line 1 Recoveries of amounts treated as qualifying distributions 4 | 01,244. |
| —————————————————————————————————————— | 61,244. |
| | |
| Deduction from distributable amount (see instructions) Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII. line 1 7 | 0. 61,244. |
| Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 Part XII Qualifying Distributions (see instructions) | 01,244. |
| | |
| Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes: | F.F. 0.F.B |
| a Expenses, contributions, gifts, etc total from Part I, column (d), line 26 | 55,257. |
| b Program-related investments - total from Part IX-B | 0. |
| Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes | |
| 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 | |
| Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4 | 55,257. |
| Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment | _ |
| income. Enter 1% of Part I, line 27b | 0. |
| Adjusted qualifying distributions Subtract line 5 from line 4 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 second control of the second control o | 55,257. |

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, | | | | _ <u></u> |
| line 7 | | | | 61,244. |
| 2 Undistributed income, if any, as of the end of 2014 | | | | <u> </u> |
| a Enter amount for 2013 only | | | 45,016. | |
| b Total for prior years: | | | | |
| , , | | 0. | | |
| 3 Excess distributions carryover, if any, to 2014: | | | | |
| a From 2009 | | | | |
| b From 2010 | | | | |
| c From 2011 | | | | |
| d From 2012 | | | | |
| e From 2013 | | | | |
| f Total of lines 3a through e | 0. | | | |
| 4 Qualifying distributions for 2014 from | | | | |
| Part XII, line 4: ► \$ 55,257. | | | | |
| a Applied to 2013, but not more than line 2a | | | 45,016. | |
| 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 | | | | 10,241. |
| e Remaining amount distributed out of corpus | 0. | | | |
| 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 instr. | | | 0. | |
| f Undistributed income for 2014. Subtract | | | | · · · · · · · · · · · · · · · · · · · |
| lines 4d and 5 from line 1. This amount must | | | | |
| be distributed in 2015 | | | | 51,003. |
| 7 Amounts treated as distributions out of | | _ | | |
| corpus to satisfy requirements imposed by | | | | |
| section 170(b)(1)(F) or 4942(g)(3) (Election | | | | |
| may be required - see instructions) | 0. | | | |
| 8 Excess distributions carryover from 2009 | | | | |
| not applied on line 5 or line 7 | 0. | | | |
| 9 Excess distributions carryover to 2015. | | | | <u></u> |
| 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 | | | | |
| 423581 | | | | Form 990-PE (2014) |

| Part XIV Private Operating F | OUNDATION (see in | estructions and Part VI | I.A. guestion (I) | | 206704 Page 10 |
|--|--|---|----------------------------|--|---------------------|
| <u> </u> | · · · · · · · · · · · · · · · · · · · | | I-A, question 9) | N/A | |
| 1 a , If the foundation has received a ruling of | | | | | |
| foundation, and the ruling is effective fo | * | ŭ | ▶ ∟_ | 1040(1/0) | 0.404.454 |
| b Check box to indicate whether the found | | ng roundation described | | 4942(j)(3) or 4 | 942(J)(5) |
| 2 a Enter the lesser of the adjusted net | Tax year (a) 2014 | (b) 2013 | Prior 3 years (c) 2012 | (d) 2011 | (e) Total |
| income from Part I or the minimum | (4) 2014 | (0) 2010 | (6) 2012 | (4) 2011 | (e) rotar |
| 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 | | | | | <u> </u> |
| 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 | | | | <u> </u> | |
| 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 Info | | | if the foundation | on had \$5,000 or m | ore in assets |
| at any time during t | he year-see inst | ructions.) | | | |
| 1 Information Regarding Foundation | on Managers: | | | | |
| a List any managers of the foundation wh | | | tributions received by t | he foundation before the clo | ose of any tax |
| year (but only if they have contributed r | nore than \$5,000). (See : | section 507(a)(2).) | | | |
| NONE | | | | | |
| b List any managers of the foundation wh other entity) of which the foundation ha | | | (or an equally large po | rtion of the ownership of a p | partnership or |
| -, | 3 a 1076 of greater intere | | | | |
| NONE | | | | | |
| 2 Information Regarding Contribut Check here ► X if the foundation of | | | | | |
| the foundation makes gifts, grants, etc. | inly makes contributions (see instructions) to indi | to preselected charitable viduals or organizations i | inder other conditions | s not accept unsolicited req complete items 2a h c an | uesis for funds. If |
| a The name, address, and telephone num | <u> </u> | | | · · · · · · · · · · · · · · · · · · · | |
| a The hame, address, and telephone hun | ibei di e-iliali address di | the person to whom app | iications should be add | 162260. | |
| | | | | | |
| b The form in which applications should l | oe submitted and informa | ation and materials they s | hould include: | · . | |
| | | | | | |
| c Any submission deadlines | | | | | |
| d Any restrictions or limitations on award | s, such as by geographic | cal areas, charitable fields | . kinds of institutions of | or other factors: | |
| , | _,, goog.upinc | | , | | |
| | | | | | |

Supplementary Information (continued) 3 Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, Recipient show any relationship to Foundation Purpose of grant or Amount any foundation manager status of contribution Name and address (home or business) or substantial contributor recipient a Paid during the year NONE PENNIES FOR BREAD PUBLIC CHARITABLE SAINT JOSEPH ABBEY SAINT BENEDICT, LA 70457 2,000. NONE BLESSED SEELOS CATHOLIC CHURCH PUBLIC CHARITABLE 3037 DAUPHINE ST NEW ORLEANS, LA 70117 5,500. GOOD SAMARITAN MISSION NONE PUBLIC CHARITABLE 285 W PEARL STREET JACKSON, WY 83001 5,000. JESUIT HIGH SCHOOL NONE PUBLIC CHARITABLE 4133 BANKS STREET NEW ORLEANS, LA 70119 2,757. HELP HOPE LIVE NONE PUBLIC CHARITABLE 101 MATSONFORD ROAD SUITE100 RADNOR PA 19087 1,000. SEE CONTINUATION SHEET(S) Total ➤ 3a 55,257. b Approved for future payment NONE Total

Part XVI-A Analysis of Income-Producing Activities

| Enter gross amounts unless otherwise indicated. | Unrelated | business income | | y section 512, 513, or 514 | (e) |
|--|-----------------|-----------------|-----------------------|----------------------------|-------------------|
| • | (a) Business | (b) Amount | (C) Exclu- sion | (d) | Related or exempt |
| 1 Program service revenue: | code | Amount | code | Amount | function income |
| a | - | | | | |
| b | | | | | |
| <u> </u> | | | | | |
| d | | | | | |
| e | - | | | | |
| g Fees and contracts from government agencies | - | | | | |
| g Fees and contracts from government agencies 2 Membership dues and assessments | | | | | |
| 3 Interest on savings and temporary cash investments | | · | | | |
| 4 Dividends and interest from securities | | | 14 | 23,883. | |
| 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 | 274,386. | *** |
| 9 Net income or (loss) from special events | | | | | |
| O Gross profit or (loss) from sales of inventory | | | | | |
| 11 Other revenue: | | | | | |
| a | | | | | . |
| b | | | | | |
| C | - | | | | |
| d | - | | | | |
| e | - | | | | |
| 12 Subtotal. Add columns (b), (d), and (e) | | (| <u> </u> | 298,269. | |
| 13 Total Add line 12, columns (b), (d), and (e) | | | | 13 | 298,269 |
| (See worksheet in line 13 instructions to verify calculations.) | | | | | |
| Part XVI-B Relationship of Activities | to the Accon | nplishment of | Exempt Po | urposes | |

| LINE NO | the foundation's exempt purposes (other than by providing funds for such purposes). | | | | | | | | | |
|---------|---|---------------------------------------|-----------|----|---------------------------------------|-------------|-------------|-------------|-------------|--|
| 8 | INVESTMENT | INCOME | GENERATED | TO | PROVIDE | FUNDS | FOR | EXEMPT | PURPOSE. | |
| | <u> </u> | | | | | | | | | |
| - | | | | | · · · · · · · · · · · · · · · · · · · | | | | | |
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|--------------|--|---|---|---|---|--|
| Sign Here | and be | penalties of perjury, I declare that I have examined this elief, it is true, correct, and complete Declaration of pre Julie Mula addre of officer or trustee | s return, including accompanying schedule: eparer (other than taxpayer) is based on all including the schedule: | s and statements, and to the information of which prepared SECRE URER Title | e best of my knowledge er has any knowledge TARY/TREA | May the IRS discuss this return with the preparer shown below (see instr.)? X Yes N |
| Paid | | Print/Type preparer's name MICHELLE ARCHAMBAULT | Preparer's signature Michelle Archambe | Date 11/8/16 | Check if self- employed | PTIN P01061653 |
| Sign Here | Firm's name ► HANNIS T. BOURGEOIS, LLP | | | | | 2-0636725 |
| | | Firm's address ► 650 POYDRAS NEW ORLEANS | S STREET, SUITE 1 S, LA 70130 | .200 | Phone no. 50 | 4-274-0200 |
| | | | | | | 5 000 DE (64 |

Part XV Supplementary Information 3 Grants' and Contributions Paid During the Year (Continuation) If recipient is an individual, Recipient Purpose of grant or contribution Foundation show any relationship to status of Amount any foundation manager Name and address (home or business) recipient or substantial contributor NOTRE DAME SEMINARY NONE PUBLIC CHARITABLE 2901 S CARROLLTON AVENUE NEW ORLEANS, LA 70118 25,000. ST. BENEDICT ABBEY NONE PUBLIC CHARITABLE P O BOX 67 STILL RIVER, MA 70457 1,000. MYASTHENIA GRAVIS FOUNDATION OF NONE PUBLIC CHARITABLE AMERICA 355 LEXINGTON AVENUE 15TH FL NEW YORK, NY 10017 1,000. NEW ORLEANS MEDICAL MISSION SERVICES NONE PUBLIC CHARITABLE 625 DISTRIBUTORS ROW HARAHAN, LA 70123 2,000. NEW ORLEANS MISSION NONE PUBLIC CHARITABLE 1134 BARONNE ST NEW ORLEANS, LA 70113 10,000. Total from continuation sheets 39,000.

| FORM .990-PF | DIVIDENDS | S AND INTER | EST | FROM SECUR | ITIES ST | ATEMENT | 1 |
|---|-------------------|-------------------------------|----------|-------------------------------|-----------------------------------|----------------------------|----|
| SOURCE | GROSS AMOUNT | CAPITAL GAINS DIVIDENDS | 5 | (A) REVENUE PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTI NET INCO | |
| COLE CREDIT PROPERTIES TRUST IV LPL FINANCIAL | 7,545. 63,142. | | O. 4. | 7,545. 16,338. | 7,545. 16,338. | • | |
| TO PART I, LINE 4 | 70,687 | 46,80 | 4. | 23,883. | 23,883. | | |
| FORM 990-PF | | ACCOUNTI | NG | FEES | Si | TATEMENT | 2 |
| DESCRIPTION | | (A) EXPENSES PER BOOKS | | (B) T INVEST- NT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITA PURPOSI | |
| ACCOUNTING FEES | _ | 2,525. | | 0. | | | 0. |
| TO FORM 990-PF, PG 1 | , LN 16B = | 2,525. | | 0. | | | 0. |
| FORM 990-PF | | TAX | ES | | S | PATEMENT | 3 |
| DESCRIPTION | | (A) EXPENSES PER BOOKS | | (B) T INVEST- NT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITA PURPOS | |
| EXCISE TAX ON INVEST | MENT | 883. | | 883. | | _ | 0. |
| TO FORM 990-PF, PG 1 | , LN 18 | 883. | | 883. | | | 0. |

| FORM (990-PF | OTHER EXPENSES | | | STATEMENT 4 | |
|--|------------------------------|-----------------------------|------|-------------------------------|----------------------------------|
| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVE MENT INC | | (C) ADJUSTED IET INCOME | (D) CHARITABLE PURPOSES |
| LPL INVESTMENT FEES | 100. | | 100. | | 0. |
| TO FORM 990-PF, PG 1, LN 23 | 100. | | 100. | | 0. |
| FORM 990-PF | OTHER INV | ESTMENTS | | | STATEMENT 5 |
| DESCRIPTION | | LUATION ETHOD | воок | VALUE | FAIR MARKET VALUE |
| NICARAGUA PAINTING COLE REIT | COST COST | | | 80,424. | 80,424. |
| ALGER SPECTRA C AMR CNT MDCP VAL C HRTFRD MDCP C | COST COST COST | | 1 | .22,755. .18,646. | 128,824. 127,948. |
| IVY MDCP C COLE CREDIT PROP TRUST IV | | COST COST COST | 1 | 24,874. 15,977. 15,250. | 124,574. 118,551. 568,427. |
| TOTAL TO FORM 990-PF, PART I | I, LINE 13 | - | 1,1 | | 1,148,748. |

Hugel Foundation
Form 990-PF 12/31/2014
51-0206704

Explanation of Amended Return

Part X line 1a and 1b on the originally filed return were inadvertently left blank. Part X lines 1a and 1b are amended to reflect the fair market value of the monthly securities and cash balances.