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Return of Private Foundation

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

OMB No 1545-0052

2014

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

Do not enter social security numbers on this form as it may be made public.

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

For calendar year 2014 or tax year beginning

, and ending

Name of foundation SAM & MARION GOLDEN HELPING HAND FOUNDATION		A Employer identification number 54-6050920
Number and street (or P.O. box number if mail is not delivered to street address) PO BOX 8278	Room/suite	B Telephone number 540 977-6205
City or town, state or province, country, and ZIP or foreign postal code ROANOKE, VA 24014		C If exemption application is pending, check here ☐
G Check all that apply: ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ 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) \$ 24,816,532. (Part I, column (d) must be on cash basis)	J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) _____	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))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check ☒ if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments		8.	8.		STATEMENT 1
4 Dividends and interest from securities		706,458.	706,458.		STATEMENT 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		1,908,998.			
b Gross sales price for all assets on line 6a		13,538,014.			
7 Capital gain net income (from Part IV, line 2)			1,908,998.		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less: Cost of goods sold					
c Gross profit or (loss)					
11 Other income		<14,977.>	<14,977.>		STATEMENT 3
12 Total. Add lines 1 through 11		2,600,487.	2,600,487.		
13 Compensation of officers, directors, trustees, etc		0.	0.		0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees STMT 4		4,950.	2,475.		2,475.
c Other professional fees					
17 Interest					
18 Taxes STMT 5		21,310.	0.		0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses STMT 6		148,970.	146,925.		2,045.
24 Total operating and administrative expenses. Add lines 13 through 23		175,230.	149,400.		4,520.
25 Contributions, gifts, grants paid		1,200,000.			1,200,000.
26 Total expenses and disbursements. Add lines 24 and 25		1,375,230.	149,400.		1,204,520.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		1,225,257.			
b Net investment income (if negative, enter -0-)			2,451,087.		
c Adjusted net income (if negative, enter -0-)				N/A	

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LHA For Paperwork Reduction Act Notice, see instructions.

Form 990-PF (2014)

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Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	40,600.	13,054.	13,054.
	2 Savings and temporary cash investments	2,785,208.	2,326,797.	2,145,460.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations STMT 7	599,047.	733,440.	723,465.
	b Investments - corporate stock STMT 8	12,232,836.	9,971,227.	10,079,057.
	c Investments - corporate bonds STMT 9	468,547.	915,649.	912,019.
	11 Investments - land, buildings, and equipment basis ▶			
Less: accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other STMT 10	7,200,933.	10,592,261.	10,943,477.	
14 Land, buildings, and equipment basis ▶				
Less: accumulated depreciation ▶				
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)	23,327,171.	24,552,428.	24,816,532.	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
23 Total liabilities (add lines 17 through 22)	0.	0.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒			
	27 Capital stock, trust principal, or current funds	0.	0.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	23,327,171.	24,552,428.	
30 Total net assets or fund balances	23,327,171.	24,552,428.		
31 Total liabilities and net assets/fund balances	23,327,171.	24,552,428.		

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	23,327,171.
2 Enter amount from Part I, line 27a	2	1,225,257.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	24,552,428.
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	24,552,428.

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CONTINUATION FOR 990-PF, PART IV
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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	SUNTRUST	P		
b	MERRILL LYNCH	P		
c	WELLS FARGO	P		
d	FLOW-THROUGH - KINDER MORGAN ENERGY PARTNERS	P		
e	FLOW-THROUGH - ENERGY TRANSFER PARTNERS	P		
f	FLOW-THROUGH - ML ASPECT FUTURE ACCESS	P		
g	FLOW-THROUGH - KKR & CO LP	P		
h	FLOW-THROUGH - OCH-ZIFF CAPITAL MGMT	P		
i	FLOW-THROUGH - THE BLACKSTONE GROUP	P		
j				
k				
l				
m				
n				
o				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	6,539,629.	5,306,350.	1,233,279.
b	6,233,221.	5,641,405.	591,816.
c	619,644.	681,261.	<61,617.>
d	<106.>		<106.>
e	1,563.		1,563.
f	140,675.		140,675.
g	1,593.		1,593.
h	<214.>		<214.>
i	2,009.		2,009.
j			
k			
l			
m			
n			
o			

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			1,233,279.
b			591,816.
c			<61,617.>
d			<106.>
e			1,563.
f			140,675.
g			1,593.
h			<214.>
i			2,009.
j			
k			
l			
m			
n			
o			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 }	2	1,908,998.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8 }	3	N/A

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Part IV Capital Gains and Losses for Tax on Investment Income

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			
b			
c			
d			
e 13,538,014.		11,629,016.	1,908,998.

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			
b			
c			
d			
e			1,908,998.

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	1,908,998.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8 }	3	N/A

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2013	985,288.	22,365,168.	.044055
2012	511,395.	18,309,275.	.027931
2011	518,467.	14,634,693.	.035427
2010	501,641.	13,722,228.	.036557
2009	501,746.	12,195,125.	.041143

2 Total of line 1, column (d)	2	.185113
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	.037023
4 Enter the net value of noncharitable-use assets for 2014 from Part X, line 5	4	25,105,822.
5 Multiply line 4 by line 3	5	929,493.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	24,511.
7 Add lines 5 and 6	7	954,004.
8 Enter qualifying distributions from Part XII, line 4	8	1,204,520.

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.

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Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)

1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		1	24,511.
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	24,511.
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	24,511.
6 Credits/Payments:			
a 2014 estimated tax payments and 2013 overpayment credited to 2014	6a	18,360.	
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	18,360.	
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	6,151.	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11 Enter the amount of line 10 to be: Credited to 2015 estimated tax ☐ Refunded ☒	11		

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
1c Did the foundation file Form 1120-POL for this year?		X
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		X
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		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?	N/A	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
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?		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	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☐ VA		
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	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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Part VII-A Statements Regarding Activities (continued)

11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11	☐	☒
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	☐	☒
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► NONE	13	☒	☐
14 The books are in care of ► MARY ANN WARD Telephone no. ► 540 977-6205 Located at ► PO BOX 8278, ROANOKE, VA ZIP+4 ► 24014-0278			
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year	15	N/A	
16 At any time during calendar year 2014, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114, (formerly TD F 90-22.1). If "Yes," enter the name of the foreign country ►	16	Yes ☐	No ☒

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)? Organizations relying on a current notice regarding disaster assistance check here	1b	N/A	
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2014?	1c		☒
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)): a At the end of tax year 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? ☐ Yes ☒ No If "Yes," list the years ► _____, _____, _____ b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) N/A 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? ☐ 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.) N/A	3b		
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		☒
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		☒

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

5a During the year did the foundation pay or incur any amount to:				
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	☐ Yes ☒ No			
(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	☐ Yes ☒ No			
(3) Provide a grant to an individual for travel, study, or other similar purposes?	☐ Yes ☒ No			
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions)	☐ Yes ☒ No			
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	☐ Yes ☒ No			
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?	N/A	5b		
Organizations relying on a current notice regarding disaster assistance check here	▶ ☐			
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?	N/A			
If "Yes," attach the statement required by Regulations section 53.4945-5(d)	☐ Yes ☐ No			
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	☐ Yes ☒ No	6b		X
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?				
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?	N/A	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.

(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
MARY ANN WARD	PRES/DIR			
PO BOX 8278				
ROANOKE, VA 24014	1.00	0.	0.	0.
JOHN LICHENSTEIN	DIRECTOR			
101 SOUTH JEFFERSON STREET				
ROANOKE, VA 24004	0.50	0.	0.	0.
DAVID TENZER	DIRECTOR			
3601 PEAKWOOD DRIVE				
ROANOKE, VA 24014	0.50	0.	0.	0.

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

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

Total number of other employees paid over \$50,000 ▶ 0

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

[illegible]**Total number of others receiving over \$50,000 for professional services** $\overline{0}$

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	N/A CONTRIBUTIONS MADE TO OTHER CHARITABLE ORGANIZATIONS	
		0.
2		
3		
4		

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

Amount

1	N/A - NONE	
2		0.
	All other program-related investments. See instructions.	
3		
Total. Add lines 1 through 3		0.

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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	23,748,052.
b	Average of monthly cash balances	1b	1,740,092.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	25,488,144.
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	25,488,144.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	382,322.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	25,105,822.
6	Minimum investment return. Enter 5% of line 5	6	1,255,291.

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	1,255,291.
2a	Tax on investment income for 2014 from Part VI, line 5	2a	24,511.
b	Income tax for 2014. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	24,511.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	1,230,780.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	1,230,780.
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	1,230,780.

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	1,204,520.
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	1,204,520.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	24,511.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	1,180,009.

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.

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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				1,230,780.
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only			295,791.	
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: ► \$ 1,204,520.				
a Applied to 2013, but not more than line 2a			295,791.	
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				908,729.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:	0.			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2013. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2014. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2015				322,051.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2009 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2010				
b Excess from 2011				
c Excess from 2012				
d Excess from 2013				
e Excess from 2014				

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

1 a 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 foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

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

NONE

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

NONE

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

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

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

MARY ANN WARD, 540 977-6205
PO BOX 8278, ROANOKE, VA 24014

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

WRITTEN REQUESTS

c Any submission deadlines:

REQUESTS ACCEPTED ANYTIME

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

NONE

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Part XV	Supplementary Information (continued)
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Enter gross amounts unless otherwise indicated.

(See worksheet in line 13 instructions to verify calculations.)

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

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
SUNTRUST-CHECKING	8.	8.	
TOTAL TO PART I, LINE 3	8.	8.	

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
ENERGY TRANSFER PARTNERS, LP	1,332.	0.	1,332.	1,332.	
KINDER MORGAN ENERGY PARTNERS	144.	0.	144.	144.	
KKR & CO LP	887.	0.	887.	887.	
MERRILL LYNCH	196,681.	0.	196,681.	196,681.	
NORTHERN TIER ENERGY	12.	0.	12.	12.	
OCH-ZIFF CAPITAL MANAGEMENT	186.	0.	186.	186.	
SUNTRUST (7911629)	264,926.	0.	264,926.	264,926.	
SUNTRUST (7912031)	26.	0.	26.	26.	
THE BLACKSTONE GROUP	1,367.	0.	1,367.	1,367.	
WELLS FARGO	240,897.	0.	240,897.	240,897.	
TO PART I, LINE 4	706,458.	0.	706,458.	706,458.	

FORM 990-PF OTHER INCOME STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
OTHER FLOW-THROUGH INCOME/LOSS FROM KINDER MORGAN ENERGY PARTNERS	<2,714.>	<2,714.>	
OTHER FLOW-THROUGH INCOME/LOSS FROM ENERGY TRANSFER PARTNERS, LP	<102.>	<102.>	
OTHER FLOW-THROUGH INCOME/LOSS FROM KKR & CO LP	<254.>	<254.>	

OTHER FLOW-THROUGH INCOME/LOSS FROM ASPECT FUTURE ACCESS LLC	<13,936.>	<13,936.>
OTHER FLOW-THROUGH INCOME/LOSS FROM NORTHERN TIER ENERGY LP	1,093.	1,093.
OTHER FLOW-THROUGH INCOME/LOSS FROM OCH ZIFF CAPITAL MGMT	594.	594.
OTHER FLOW-THROUGH INCOME/LOSS FROM THE BLACKSTONE GROUP	342.	342.
TOTAL TO FORM 990-PF, PART I, LINE 11	<14,977.>	<14,977.>

FORM 990-PF	ACCOUNTING FEES			STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
ACCOUNTING FEES	4,950.	2,475.		2,475.	
TO FORM 990-PF, PG 1, LN 16B	4,950.	2,475.		2,475.	

FORM 990-PF	TAXES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FOREIGN TAXES	1,702.	0.		0.	
2014 FEDERAL INCOME TAX QUARTERLY ESTIMATES	18,360.	0.		0.	
2013 FEDERAL INCOME TAX	1,248.	0.		0.	
TO FORM 990-PF, PG 1, LN 18	21,310.	0.		0.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
LIABILITY INSURANCE	1,760.	880.		880.	
INVESTMENT FEES	145,972.	145,972.		0.	
REGISTRATION FEES	25.	0.		25.	
STORAGE RENTAL	1,067.	0.		1,067.	
P.O. BOX FEE	146.	73.		73.	
TO FORM 990-PF, PG 1, LN 23	148,970.	146,925.		2,045.	

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS	STATEMENT	7
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DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
U.S. GOVERNMENT BONDS	X		733,440.	723,465.
TOTAL U.S. GOVERNMENT OBLIGATIONS			733,440.	723,465.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS				
TOTAL TO FORM 990-PF, PART II, LINE 10A			733,440.	723,465.

FORM 990-PF	CORPORATE STOCK	STATEMENT	8
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
INVESTMENTS-MUTUAL FUNDS	9,971,227.	10,079,057.
TOTAL TO FORM 990-PF, PART II, LINE 10B	9,971,227.	10,079,057.

FORM 990-PF	CORPORATE BONDS	STATEMENT	9
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE BONDS	915,649.	912,019.
TOTAL TO FORM 990-PF, PART II, LINE 10C	915,649.	912,019.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	10
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
KINDER MORGAN ENERGY PARTNERS	COST	0.	0.
ENERGY TRANSFER PARTNERS, LP	COST	0.	0.
KKR & CO, LP	COST	0.	0.
EQUITIES	COST	7,750,743.	8,043,657.
OTHER INVESTMENTS	COST	2,359,490.	2,434,598.
ASPECT FUTURES ACCESS LLC	COST	469,734.	454,187.
NORTHERN TIER ENERGY LP	COST	0.	0.

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OCH-ZIFF CAPITAL MANAGEMENT	COST	10,245.	9,005.
THE BLACKSTONE GROUP	COST	2,049.	2,030.
TOTAL TO FORM 990-PF, PART II, LINE 13		<u>10,592,261.</u>	<u>10,943,477.</u>

THE SAM AND MARION GOLDEN HELPING HAND FOUNDATION , INC.

2014 Jewish Grants

\$287,500.	Beth Israel Synagogue 920 Franklin Road SW Roanoke, VA 24016
5,000.	Hillel of Radford University 1906 Belleview Avenue Radford, VA
10,000.	Hillel of Virginia Tech 710 Toms Creek Road Blacksburg, VA 24060
5,000.	Jewish Community Preschool Beth Israel Congregation 920 Franklin Road SW Roanoke, VA 24016
5,000.	Jewish Community Religious School Temple Emanuel 1163 Persinger Road SW Roanoke, VA 24016
287,500.	Temple Emanuel 1163 Persinger Road SW Roanoke, VA 24016

\$600,000.	Total
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THE SAM AND MARION GOLDEN HELPING HAND FOUNDATION, INC.

2014 Non-Jewish Grants

\$ 5,000.	Ambling Amazement Square, The Rightmire Childrens Museum 27 9th Street lynchburg, VA 25404	20,000.	Family Service of Roanoke Valley 360 Campbell Avenue SW Roanoke, VA 24016
25,000.	American Red Cross 35A Church Avenue Roanoke, VA 24011	48,725.	Feeding America SW VA 1025 Electric Road Salem, VA 24153
50,000.	Apple Ridge Farm 544 Luck Avenue Roanoke, VA 24016	10,000.	Greenvale School 627 Westwood Blvd NW Roanoke, VA 24017
3,000.	Bethany Christian Church 3115 Fleming Avenue NW Roanoke, VA 24012	2,000.	Henry Fork Service Center 130 Doe Run Road Rocky Mount, VA 24151
20,000.	Big Brothers Big Sisters of SW VA 124 Wells Avenue NW Roanoke, VA 24013	50,000.	Jefferson Center 541 Luck Avenue SW Suite 100 Roanoke, VA 24016
10,000.	Boys and Girls Clubs of SW va 1714 9th. Street SE Roanoke, VA 24013	7,500.	Lutheran Family Services of VA 2609 McVitty Road Roanoke, VA 24019
40,000.	Bradley Free Clinic 1240 Third Street SW Roanoke, VA 24016	15,000.	Mill Mountain Theatre One Market Square Suite 26 Roanoke, VA 24011
10,000.	Brain Injury Services of SW VA 3904 Franklin Road SW Roanoke, VA 24014	42,225.	Mill Mountain Zoo 2404 Prospect Road SE Roanoke, VA 24011
7,500.	Center in the Square One Market Square SW Roanoke, VA 24011	1,500.	Opera Roanoke One Market Square Suite 22 Roanoke, VA 24011
10,000.	CITP of Roanoke Valley 1201 Third Street SW Roanoke, VA 24016	5,000.	Planned Parenthood Health Systems 2707 Peters Creek Road Roanoke, VA 24017
9,000.	Childrens Trust Roanoke Valley 541 Luck Avenue Suite 308 Roanoke, VA 24016-5023	15,000.	Presbyterian Community Center 1228 Jamison Avenue SW Roanoke, VA 24013
10,000.	Cumberland College 6191 College Drive Williamsburg, KY 40769	48,725.	Rescue Mission Ministries 406 4th. Street SE Roanoke, VA 24013
8,725.	Family Promise of Greater Roanoke 37 East Clay Street Salem, VA 24153	50,000.	Roanoke Area Ministries 824 Campbell Avenue Roanoke, VA 24016

THE SAM AND MARION GOLDEN HELPING HAND FOUNDATION, INC.

2014 Non-Jewish Grants (continued)

3,000. Roanoke Childrens Theatre
P. O. Box 4932
Roanoke, VA 24013

5,375. Roanoke Valley SPCA
1340 Baldwin Avenue NE
Roanoke, VA 24012

5,000. St. John Neumann Academy
2470 Research Center Drive
Blacksburg, VA 24060

5,000. Virginia College Fund
3112 W. Marshall St. Suite 214
Richmond, VA 23230

2,000. Virginia Foundation for Independent Colleges
810 Ridge Road
Richmond, VA 23229

10,000. Virginia Museum of Transportation
303 Norfolk Avenue SW
Roanoke, VA 24016

2,000. Warm Hearth Foundation
2607 Warm Hearth Drive
Blacksburg, VA 24060

33,725. West End Center
1223 Patterson Avenue SW
Roanoke, VA 24016

10,000. YMCA Magic Place
540 Church Avenue
Roanoke, VA 24016

600,000. Total