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Form **990-PF**Department of the Treasury
Internal Revenue Service**Return of Private Foundation**
or Section 4947(a)(1) Trust Treated as Private Foundation▶ Do not enter social security numbers on this form as it may be made public.
▶ Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf.

OMB No 1545-0052

2014

Open to Public Inspection

For calendar year 2014 or tax year beginning January 1, 2014, and ending December 31, 2014

Name of foundation The Blumenthal Foundation for Charity, Religion, Education and Better Inter-Faith Relations		A Employer identification number 56-0793667
Number and street (or P O box number if mail is not delivered to street address) P.O. Box 34689		B Telephone number (see instructions) 704-688-2305
City or town, state or province, country, and ZIP or foreign postal code Charlotte, NC 28234-4689		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ 21,457,174	J Accounting method: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)				
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	9,217	9,217		
	4 Dividends and interest from securities	221,621	221,621		
	5a Gross rents	65,000			
	b Net rental income or (loss) 43,635				
	6a Net gain or (loss) from sale of assets not on line 10	69,606			
	b Gross sales price for all assets on line 6a 69,606				
	7 Capital gain net income (from Part IV, line 2)		69,606		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less: Cost of goods sold					
c Gross profit or (loss) (attach schedule)					
11 Other income (attach schedule)	6,450	6,450			
12 Total. Add lines 1 through 11.	371,894	306,894			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.				
	14 Other employee salaries and wages	73,930	22,179		51,751
	15 Pension plans, employee benefits	15,075	4,523		10,552
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	6,000			6,000
	c Other professional fees (attach schedule)	126,613			126,613
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	11,556	11,556		
	19 Depreciation (attach schedule) and depletion	3,358	3,358		
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	70,427	21,128		49,299
	24 Total operating and administrative expenses. Add lines 13 through 23.	306,959	62,744		244,215
	25 Contributions, gifts, grants paid	591,694			591,694
26 Total expenses and disbursements. Add lines 24 and 25.	898,653	62,744		835,909	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	-526,759				
b Net investment income (if negative, enter -0-)		244,150			
c Adjusted net income (if negative, enter -0-)			0		

For Paperwork Reduction Act Notice, see instructions.

Cat No 11289X

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. (See instructions.)		Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing		90,365	481,637	481,637
	2	Savings and temporary cash investments				
	3	Accounts receivable ▶				
		Less: allowance for doubtful accounts ▶				
	4	Pledges receivable ▶				
		Less: allowance for doubtful accounts ▶				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)				
	7	Other notes and loans receivable (attach schedule) ▶				
		Less: allowance for doubtful accounts ▶		236,700	0	0
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges		40,834	56,103	56,103
	10a	Investments—U.S. and state government obligations (attach schedule)		20,456,674	20,711,068	20,711,068
	b	Investments—corporate stock (attach schedule)				
	c	Investments—corporate bonds (attach schedule)				
	11	Investments—land, buildings, and equipment: basis ▶	432,242			
	Less: accumulated depreciation (attach schedule) ▶	-223,876		211,724	208,366	
12	Investments—mortgage loans					
13	Investments—other (attach schedule)					
14	Land, buildings, and equipment: basis ▶					
	Less: accumulated depreciation (attach schedule) ▶		211,724			
15	Other assets (describe ▶)					
16	Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)		21,036,297	21,457,174	21,457,174	
Liabilities	17	Accounts payable and accrued expenses		97,822	30,756	
	18	Grants payable		522,994	274,863	
	19	Deferred revenue		33,933	29,482	
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable (attach schedule)				
	22	Other liabilities (describe ▶)				
	23	Total liabilities (add lines 17 through 22)		654,749	335,101	
Net Assets or Fund Balances		Foundations that follow SFAS 117, check here <input type="checkbox"/>				
	24	Unrestricted				
	25	Temporarily restricted				
	26	Permanently restricted				
		Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>				
	27	Capital stock, trust principal, or current funds				
	28	Paid-in or capital surplus, or land, bldg., and equipment fund		10,953,155	10,953,155	
	29	Retained earnings, accumulated income, endowment, or other funds		9,428,393	10,168,918	
30	Total net assets or fund balances (see instructions)		20,381,548	21,122,073		
31	Total liabilities and net assets/fund balances (see instructions)		21,036,297	21,457,174		

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	20,381,548
2	Enter amount from Part I, line 27a	2	-526,759
3	Other increases not included in line 2 (itemize) ▶ <u>Unrealized Gain on Net Investments</u>	3	1,267,284
4	Add lines 1, 2, and 3	4	
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	21,122,073

Part IV Capital Gains and Losses for Tax on Investment Income

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

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

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

(i) FMV 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			

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	69,606
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8	3	

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

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

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

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

1 Enter the appropriate amount in each column for each year; see 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	1,046,116	19,910,207	5.2541
2012	924,702	18,917,831	4.8879
2011	1,202,135	19,052,155	6.3097
2010	1,376,700	18,734,510	7.3485
2009	1,228,546	18,136,175	6.7740

2	Total of line 1, column (d)	2	30.5742
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	6.11
4	Enter the net value of noncharitable-use assets for 2014 from Part X, line 5	4	21,054,559
5	Multiply line 4 by line 3	5	1,286,434
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	2,442
7	Add lines 5 and 6	7	1,288,876
8	Enter qualifying distributions from Part XII, line 4 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.	8	835,909

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 <input type="checkbox"/> 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 <input type="checkbox"/> and enter 1% of Part I, line 27b		1	6,137	88
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).				
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2		
3 Add lines 1 and 2		3	6,137	88
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4		
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	6,137	88
6 Credits/Payments:				
a 2014 estimated tax payments and 2013 overpayment credited to 2014	6a	36,923	96	
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	36,923	96	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8			
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9			
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	30,786	08	
11 Enter the amount of line 10 to be: Credited to 2015 estimated tax 30,786 08 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?		✓
b 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.		
c Did the foundation file Form 1120-POL for this year?		✓
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ \$ _____ (2) On foundation managers. ▶ \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS?		✓
If "Yes," attach a detailed description of the activities.		
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		✓
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		✓
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?		✓
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: • 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?	✓	
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	✓	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ North Carolina		
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	✓	
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		✓
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		✓

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?	13	✓	

Website address ► blumenthalfoundation.org

14 The books are in care of ► Peggy Gartner Telephone no. ► 704-688-2305
 Located at ► 1355 Greenwood Cliff #200 Charlotte, NC ZIP+4 ► 28204

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041—Check here. ☐
 and enter the amount of tax-exempt interest received or accrued during the year 15

16 At any time during calendar year 2014, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? ☐ Yes ☒ No
 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.

	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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	1b	
Organizations relying on a current notice regarding disaster assistance check here <input type="checkbox"/>		
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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ► 20____, 20____, 20____, 20____		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	2b	✓
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► 20____, 20____, 20____, 20____		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	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	✓

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)? ☐ Yes ☒ NoOrganizations relying on a current notice regarding disaster assistance check here ☐**c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ No

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

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

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

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No**b** If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? ☐ Yes ☒ No**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors****1** List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Alan Blumenthal 1355 Greenwood Cliff #200 Charlotte, NC 28204	Trustee, Part-time	0	0	0
Philip Blumenthal 1355 Greenwood Cliff #200 Charlotte, NC 28204	Trustee, Part-time	0	0	0
Samuel Blumenthal 1355 Greenwood Cliff #200 Charlotte, NC 28204	Trustee, Part-time	0	0	0

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Peggy Gartner 1355 Greenwood Cliff #200 Charlotte, NC 28204	Program Admin 40	73,930	1,498	0

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

1

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *(continued)***3** Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
None		

Total number of others receiving over \$50,000 for professional services ▶

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 None	
2	
3	
4	

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

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

	Amount
1 None	
2	
All other program-related investments See instructions	
3	

Total. Add lines 1 through 3 ▶

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	20,787,204
b	Average of monthly cash balances	1b	299,878
c	Fair market value of all other assets (see instructions)	1c	288,105
d	Total (add lines 1a, b, and c)	1d	21,375,187
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	21,375,187
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see instructions)	4	320,628
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	21,054,559
6	Minimum investment return. Enter 5% of line 5	6	1,052,728

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	1,052,728
2a	Tax on investment income for 2014 from Part VI, line 5	2a	6,138
b	Income tax for 2014. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	6,138
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	1,046,590
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	1,046,590
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	1,046,590

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	835,909
b	Program-related investments—total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
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	835,909
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions)	5	
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	835,909

Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2013	(c) 2013	(d) 2014
1 Distributable amount for 2014 from Part XI, line 7				1,046,590
2 Undistributed income, if any, as of the end of 2014:				
a Enter amount for 2013 only				
b Total for prior years: 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2014:				
a From 2009	323,249			
b From 2010	457,279			
c From 2011	262,637			
d From 2012	0			
e From 2013	71,466			
f Total of lines 3a through e	1,114,631			
4 Qualifying distributions for 2014 from Part XII, line 4: ► \$ 835,909				
a Applied to 2013, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions)				
c Treated as distributions out of corpus (Election required—see instructions)				
d Applied to 2014 distributable amount				1,046,590
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a).)	210,681			210,681
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	903,950			
b Prior years' undistributed income. Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b. Taxable amount—see instructions				
e Undistributed income for 2013. Subtract line 4a from line 2a. Taxable amount—see instructions				
f Undistributed income for 2014. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2015				
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required—see instructions)				
8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions)	112,568			
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a	791,382			
10 Analysis of line 9:				
a Excess from 2010	457,279			
b Excess from 2011	262,637			
c Excess from 2012	0			
d Excess from 2013	71,466			
e Excess from 2014	0			

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

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

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

See Attached

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

See Attached

c Any submission deadlines:

See Attached

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

See Attached

Part XV **Supplementary Information** (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

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

· The Blumenthal Foundation
Part I Line 11
Other Income

Name	Description	Amount
Jefferson Pilot Communications	Earned Easement	4,450.12
Armored Car Productions, LLC 9242 Beverly Blvd. Suite 300 Beverly Hills, CA 90210	Items used from Loomis Fargo building to upcoming movie	2,000.00
	Total	\$ 6,450.12

The Blumenthal Foundation
Part I Line 16b
Accounting Fees

Name	Description	Amount
C. DeWitt Foard & Company, P.A. 1001 Morehead Square Drive Suite 450 Charlotte, NC 28203	Audit	\$ 6,000.00

The Blumenthal Foundation
Part I Line 16c
Other Professional Fees

Name	Description	Amount
Ashdon Investments	Consultant on investments	126,613.39
	\$	126,613.39

The Blumenthal Foundation
Part I Line 18
Taxes

Name	Description	Amount
Mecklenburg City-County Tax	Property Tax	\$ 11,556 00
		\$ 11,556.00

THE BLUMENTHAL FOUNDATION DEPRECIATION SCHEDULE
December 31, 2014

EXPENSE CODE	DATE ACQRD	ASSETS				LIFE IN YEARS	BALANCE 11/30/2014	PROV	DEDUCT	BALANCE 12/31/2014
		COST 12/31/2013	ADDITNS	DEDUCT	COST 12/31/2014					
14050 BUILDINGS										
58	WELLS-FARGO									
58	WELLS-FARGO	95,180 00			95,180 00	45	90,356 25	2,115 11		92,471 36
58	WELLS-FARGO	-			-	45	0 00	0 00		0 00
58	WELLS-FARGO	24,903 00			24,903 00	45	21,582 57	553 40		22,135 97
58	WELLS-FARGO	17,237 00			17,237 00	25	15,168 52	689 48		15,858 00
TOTAL BUILDINGS		137,320.00	0.00		137,320.00		127,107.33	3,357.99		130,465.32

The Blumenthal Foundation
Part I Line 23
Other Expenses

Description	Amount
Office Supplies	977.53
Contractor Labor	22,213.99
Postage	646.10
Dues and Subscriptions	8,943.98
Software and Software Maint	7,102.63
Insurance	856.32
Education and Seminars	2,236.00
Property Insurance	4,247.83
Building Repair	94.00
Foundation Meetings	49.41
Bank Charges	90.00
Storm Water	2,109.06
Excise Tax	20,860.00
	\$ 70,427

The Blumenthal Foundation
Part II Line 10a
Investments

Name	Amount
BNY Mellon	\$ 5,616,649
Angelo Gordon	\$ 1,173,455
Ashdon Select Investment Manage	\$ 13,065,984
Horseman Global Fund	<u>\$ 854,980</u>
	\$ 20,711,068

THE BLUMENTHAL FOUNDATION DEPRECIATION SCHEDULE

December 31, 2014

Part II
Line 11

EXPENSE CODE	DATE ACQD	ASSETS				LIFE IN YEARS	BALANCE 12/31/2013	Monthly	DEDUCT	BALANCE 12/31/2014
		COST 12/31/2013	ADDITNS	DEDUCT	COST 12/31/2014					
14050 BUILDINGS										
58	76-62	1972	95,180 00		95,180 00	45	88,303 65		2,115 11	90,128 76
58	76-62	1973	-		-	45	-		-	-
58	76-62	1974	24,903 00		24,903 00	45	21,121 40		553 40	21,674 80
58	76-62	19774	17,237 00		17,237 00	25	14,593 95		689 48	15,283 43
TOTAL BUILDINGS			137,320.00	0.00	137,320.00		124,019.00	-	3,357.99	127,086.99
03	76-62	1995	35,490 00		35,490 00	10	35,490 00	-		35,490 00
03	76-62	2000	12,880 00		12,880 00	5	12,880.00	-		12,880 00
50	76-62	1972	4,187 00		4,187 00	20	4,187 00	-		4,187 00
Total Land Improvements			52,557.00		52,557.00		52,557.00			52,557.00
32	76-62	1995	4,796.00		4,796 00	10	4,796 00	-		4,796.00
1000	83-62	1997	4,404 00		4,404 00	5	4,404.00	-		4,404.00
75	83-62	1998	2,303 98		2,303 98	5	2,303 98	-		2,303 98
2002		2002	333 65		333 65	5	333 65	-		333.65
2002		2002	1,739 70		1,739 70	5	1,739.70	-		1,739 70
2004		2004	1,566.58	0 00	1,566 58	5	1,566 58	-		1,566 58
Total Equipment			15,143.91		15,143.91		15,143.91			15,143.91
17050 OFFICE FURN. & FIXTURES										
	Computers	2007	9,451 94	0 00	9,451 94	5	9,451.94	0.00		9,451.94
	Furniture-Philip	2007	6,050.00	0 00	6,050 00	5	6,050 00	0.00		6,050 00
01	B F OFFICE FURN & FI	1999	13,285 93		13,285 93	10	13,295.93	0 00	0 00	13,295.93
			28,787.87	0.00	28,787.87		28,797.87	0.00		28,797.87
Land			198,433.28							
Total			432,242.06						Depreciation	223,875.78

The Blumenthal Foundation

Part IV

Line 1a

Ashdon Investments	01/31/2014 Real Gain Ashdon 01/14	300,735.90
Ashdon Investments	02/28/2014 Real Gain Ashdon 02/14	42,033.46
Ashdon Investments	03/31/2014 Real Gain 03/14	40,796.28
Ashdon Investments	04/30/2014 Real Gain 04/14	21,403.11
Ashdon Investments	05/31/2014 Real Loss 05/14	-16,862.12
Ashdon Investments	06/30/2014 Real Gain 06/14	95,046.17
PIMCO	06/30/2014 Gain 06/14	9,114.40
Ashdon Investments	07/31/2014 Real Gain 07/14	82,953.36
Ashdon Investments	07/31/2014 Real Gain 07/14	85,935.72
Ashdon Investments	08/31/2014 Real Gain 08/14	2,633.91
Ashdon Investments	08/31/2014 Real Gain 08/14	82,780.50
Ashdon Investments	09/30/2014 Real Gain 09/14	281,012.92
Ashdon Investments	10/31/2014 Real Loss 10/14	-1,677.87
Ashdon Investments	10/31/2014 Real Gain 10/14	37,223.32
Ashdon Investments	11/30/2014 Real Gain Ashdon 11/14	53,114.70
Ashdon Investments	11/30/2014 Real Gains Ashdon 11/14	31,998.68
Ashdon Investments	12/31/2014 Real Gain Ashdon 12/14	953.85
PIMCO	12/31/2014 Sell of PIMCO 12/15 and Marketfield 12/15	-56,175.03
PIMCO	12/31/2014 Reclassify investment earnings	-1,023,415.00
		<hr/>
		69,606.26

Part XV
Line 3a

Name	Name Address	Memo	Amount
Foundation For The Carolinas	220 North Tryon Street Charlotte, NC 28202	Move Mitchell/Yancey & NC Network grant-duplicates	-4,000.00
Big Brothers Big Sisters of Greater Charlotte	3801 E Independence Blvd Charlotte, NC 28205	Annual Meeting	600.00
Foundation For The Carolinas	220 North Tryon Street Charlotte NC 28202	General Operating Support	1,000.00
Bakersville Historic Courthouse Foundation	c/o Sherry Lovett P O Box 280 Little Switzerland NC 28748	For support of the Leadership Gift School	2,500.00
Footfalls Conservancy of N C, Inc	P O Box 3023 Morganton, NC 28680	Too River Storytelling Festival	2,000.00
Land Trust Alliance	P O Box 33355 Raleigh, NC 27638-3355	For support of the Conservancy's land and water protection programs	5,000.00
Sustain Charlotte	2317 Laburnum Avenue Charlotte, NC 28205	A grant to help bring together land conservations organizations from 12 SE states	2,500.00
UNC Charlotte Grants & Contract Administr	9201 University City Boulevard Charlotte, NC 28223-0001	Sponsorship of 2014 Sustain Charlotte Awards + Earth Day Celebration	1,000.00
Charlotte County Day School	1440 Camel Road Charlotte, NC 28226-5096	For support of Keeping Watch Alliance, a three-year project designed to foster collaboration ac	7,500.00
McColl Center for Visual Art	721 North Tryon Street Charlotte, NC 28202	Annual Fund Drive	1,500.00
United Way of Central Carolinas	P O Box 601942 Charlotte, NC 28260-1942	A grant to support the development of communication materials and status updates of evaluation i	5,000.00
Opera Carolina	Two Wachovia Center 301 S Tryon Street - #1550 Charlotte, NC 28282	list of 4 payment on one-year \$15,000.00 grant for Alexis de Toqueville Society	3,750.00
American Diabetes Association	1300 Baxter Street - Suite 150 Charlotte, NC 28204	For support of the Education Programs for the 2014 season	2,500.00
Mitchell County Animal Rescue, Inc	P O Box 308 Spruce Pine, NC 28777	In honor of Robert Norns - 2014 Father of the Year Award	1,000.00
Arts and Science Council	P O Box 602720 Charlotte, NC 28260-2720	A grant for support of the Fur Ball - celebrating 30th years of service to animals in Mitchell City	500.00
Discovery Place	301 North Tryon Street Charlotte, NC 28202-9907	1st payment on one-year \$20,000 grant for Annual Fund Drive	5,000.00
Community School of the Arts	345 North College Street Charlotte, NC 28202	A grant for support of World Oceans Day featuring Miz Blue. The Great Whale Conservancy's 80 foot	3,500.00
Jewish Federation of Greater Charlotte	5007 Providence Rd Charlotte, NC 28226	A grant to provide funding for the school's financial aid program	5,000.00
Wildacres Leadership Initiative	711 Iredell Street Suite A Durham, NC 27705	For the Annual Support of the Levine-Sklud Library and Resource Center	1,000.00
Conservation Trust of North Carolina	P O Box 33333 Raleigh, NC 27638-3333	General Operating Support	35,000.00
Jewish Community Center of Charlotte	5007 Providence Rd Charlotte NC 28226	General Operating Support	5,000.00
Jewish Federation of Greater Charlotte	P O Box 35235 Charlotte, NC 28235	One For All Concert - No good and services requested	5,000.00
Mecklenburg GuardianAd Litem Advocacy FDN	534 Spratt Street Charlotte, NC 28206	1st payment on \$210,000 Grant - \$200,000 for Annual Campaign - \$10,000 Supplemental Giving	42,000.00
Shelter Health Services	P O Box 601942 Charlotte, NC 28260-1942	A project to help improve the outcomes for teenagers aging out of foster care	1,000.00
United Way of Central Carolinas	P O Box 602720 Charlotte, NC 28260-2720	A grant for support of the free clinic's Early Detection and Prevention Program for homeless wom	5,000.00
Arts and Science Council	P O Box 882 Burnsville 28714	2nd payment on \$15,000.00 grant for Annual Campaign	3,750.00
Bakersville Creek Walk Arts Festival	1504 Silver Street Sheffield MD 01257	2nd payment on 1-year \$20,000.00 grant	5,000.00
Hands In Outreach	210 West Cameron Avenue Chapel Hill, NC 27516-2751	For support of the Annual Festival	500.00
North Carolina Hill	5007 Providence Rd Charlotte NC 28226	A grant for an educational scholarship program for poor children in Nepal	1,500.00
Jewish Federation of Greater Charlotte	5007 Providence Rd Charlotte, NC 28226	A grant to help underwrite the cost of hiring a Coordinator for Hill in the Queen City	5,000.00
Jewish Federation of Greater Charlotte	334 Blackwell Street Suite 300 Durham NC 27701	2nd payment on \$210,000.00 commitment to Federation for Annual Campaign	42,000.00
Nature Conservancy - NC Chapter	1110 Navaho Dr Suite 200 Raleigh, NC 27609-7322	For support of the Stop the Sirens Campaign	5,000.00
Partners for Parks	5841 Brookshire Blvd Charlotte, NC 28218	Annual Fund Drive	2,000.00
Arctic Voices	c/o Hasvard Ayers 346 Fieldstream Drive Boone NC 28607	A grant to help underwrite the annual conference to be held in the Research Triangle Park	2,500.00
Classroom Central	2118 Wilkinson Blvd Charlotte, NC 28208	For support of the annual campaign	2,500.00
Jewish Federation of Greater Charlotte	5007 Providence Rd Charlotte NC 28226	Help underwrite two busses to transport 80 ASU students and 30 others to NY City for Climate Cha	5,000.00
United Way of Central Carolinas	P O Box 601942 Charlotte, NC 28260-1942	General Operating Support	42,000.00
Charlotte Chapter of Hadassah	7804 Fairview Road #129 Charlotte, NC 28228	Annual Fund Drive and Impact Fund - 3 of 5 payments on \$210,000 grant	3,750.00
Wildacres Leadership Initiative	711 Iredell Street Suite A Durham NC 27705	3rd payment on 2014 grant for Alexis de Toqueville Society Drive - \$15,000.00	425.00
Greater Carolinas Association of Rabbis	c/o Rabbi David Ostirich Congregation Bnt Shalom 620 E Hamilton Avenue	Support of 2015 telephone directory	45,000.00
Allegro Foundation	3121 Providence Road Charlotte NC 28211	General Operating Expenses	7,000.00
Arts and Science Council	P O Box 602720 Charlotte, NC 28260-2720	Partially fund FREE weekly movement education classes	4,000.00
International House	1817 Central Avenue - #215 Charlotte, NC 28205	3rd payment on one-year \$20,000.00 grant for Annual Fund Drive	5,000.00
Jewish Federation of Greater Charlotte	5007 Providence Rd Charlotte, NC 28226	A grant for the Immigration Law Clinic and citizenship classes	3,500.00
Jewish Federation of Greater Charlotte	5007 Providence Rd Charlotte, NC 28226	4th payment on one-year grant for Annual Fund Drive	42,000.00
North Carolina Writers Network	200 Clanton Road Charlotte, NC 28217	Grant to help fund the Main Event in December 2014	2,500.00
Ulfespan Foundation	P O Box 1101 Spruce Pine, NC 28777-1101	A grant for support of the Network's Fall Conference - November 21-22, 2014 in Charlotte	1,500.00
Foundation for Mitchell County		A grant to help fund two Lifespan Creative Campus location in Charlotte	5,000.00
		A grant to help build the endowment fund for Mitchell County	2,500.00

Wildscapes Leadership Initiative	711 Iredell Street Suite A Durham, NC 27705	Final payment on one-year \$100,000 grant for general operating support	20,000 00
Appalachian Voices	171 Grand Blvd Boone, NC 28607	For the High Country Home Entergy Makeover contest	2,500 00
Big Brothers Big Sisters of Greater Charlotte Public Tree Fund, Inc	3801 E Independence Blvd Charlotte, NC 28205	General Operating Support	1,000 00
Generation Nation	P O Box 31723 Charlotte, NC 28231	General Operating Support	1,000 00
Gids on the Run Charlotte	700 East Stonewall Street #710 Charlotte, NC 28202	A grant to help expand and strengthen teen civic leadership and literacy programs	2,500 00
HandMade in America	120 Cottage Place Charlotte NC 28207	For support of general operating expenses related to expanding programming to 20 new sites	2,500 00
McDowell Health Coalition	125 S Lexington Avenue - #101 Asheville NC 28801	A grant to help to grow economies through craft and creative placemaking through work with local	2,500 00
N C Conservation Network	208 Spaulding Road Marion NC 28167	A grant to help promote community health by assessing the health status of county residence	2,500 00
Southern Environmental Law Center	19 East Martin Street - Suite 300 Raleigh, NC 27601	A grant to help expand the Communication Infrastructure project through greater outreach to NC c	10,000 00
United Way of Central Carolinas	201 W Main Street - #14 Charlottesville, VA 22902	A grant for general operating support	1,000 00
Charlotte Community Health Clinic	P O Box 601842 Charlotte, NC 28260-1942	Final payment on one-year \$15,000 00 grant	3,750 00
Arts and Science Council	9401 Medical Plaza Drive Charlotte, NC 28262	A grant to help provide primary healthcare for at-risk adults and children	5,000 00
Community Building Initiative	P O Box 602720 Charlotte, NC 28260-2720	Final payment on one-year \$20,000 00 grant	5,000 00
Earth Share of North Carolina	220 North Tryon Charlotte, NC 28202	For general operating support	2,500 00
Jewish Federation of Greater Charlotte	P O Box 186 Durham, NC 27702	A grant to support the implementation of both proven and new strategic initiatives to make ESNC	2,500 00
Joined In Education	5007 Providence Rd Charlotte, NC 28226	5th and final payment for one-year on 210,000 00 grant for Annual Campaign and Impact Fund	42,000 00
UNC - Pembroke	P O Box 79180 Charlotte, NC 28271-7059	A grant for support of the conferece on "The Big Disconnect Protecting Childhood and Family Re	1,800 00
Communities In Schools	One University Drive P O Box 1510 Pembroke, NC 28372	A grant to help underwrite a program of "Civil War Songs and Stories" on the campus in February	1,000 00
	500 E Morehead Street Suite 218 Charlotte, NC 28202	To adjust to actual	2,000 00
		to adjust to actual	80,000 00
			572,325 00
			572,325 00

- Part XV
Line 3b

Grant Commitment Schedule (6 years)

1/1/2015

Organization Grant Amount	Total Paid	Scheduled Payments				Remaining Balance	
		2015	2016	2017	2018	2019	2020
Blue Ridge Parkway Foundation, Inc. \$ 15,000.00 <i>A grant to assist with the TRACK TRAIL in Charlotte and integrate it into a growing network of trails that will get young people outside and connected with nature and in turn become the stewards of the future.</i>	\$10,000.00	\$5,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Catawba Lands Conservancy \$ 50,000.00 <i>A grant for general operating support to be used to add an additional staff position to help with developments efforts for both the Conservancy and Thread Trail.</i>	\$20,000.00	\$10,000.00	\$10,000.00	\$0.00	\$0.00	\$0.00	\$10,000.00
Discovery Place \$ 25,000.00 <i>A grant for support of a new initiative at the Discovery Place Education Studio at the BofA STEM Center for Career Development. to provide scholarships for edu- cators to participate in a variety of proven professional development programs and workshops</i>	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$0.00	\$0.00

Organization Grant Amount	Total Paid	Scheduled Payments				Remaining Balance
		2015	2016	2017	2018	
Foundation For The Carolinas \$ 125,000.00 <i>A multi-year grant for the support of the Carolina Thread Trail Fund.</i>	\$75,000.00	\$25,000.00	\$25,000.00	\$0.00	\$0.00	\$0.00
The Greater Charlotte Cultural Trust \$ 125,000.00 <i>A multi-year grant for the Cultural Facilities Campaign.</i>	\$75,000.00	\$25,000.00	\$25,000.00	\$0.00	\$0.00	\$0.00
Institute for the Environment - UNC-Chapel Hill \$ 30,000.00 <i>A multi-year grant to provide capacity-building funding that benefits the UNC Institute for the Environment's Translational Institute.</i>	\$10,000.00	\$10,000.00	\$0.00	\$0.00	\$0.00	\$10,000.00
Lynnwood Foundation \$ 12,500.00 <i>A grant for the support of The Duke Mansion and The Lee Institute 100th Anniversary Campaign.</i>	\$0.00	\$2,500.00	\$2,500.00	\$2,500.00	\$2,500.00	\$2,500.00
Nature Conservancy-NC Chapter \$ 50,000.00 <i>A grant for support of the "Campaign for Sustainable Planet".</i>	\$30,000.00	\$10,000.00	\$10,000.00	\$0.00	\$0.00	\$0.00

Organization Grant Amount	Total Paid	Scheduled Payments			Remaining Balance		
		2015	2016	2017	2018	2019	2020
Penland School of Crafts \$ 100,000.00 <i>A multi-year grant for the capital infrastructure priorities within the Campaign for Penland's Future (CPT).</i>	\$60,000.00	\$20,000.00	\$20,000.00	\$0.00	\$0.00	\$0.00	\$0.00
University of North Carolina - Charlotte \$ 22,500.00 <i>A multi-year grant to help fund a collaborative initiative to help educate the public on issues about the natural environment.</i>	\$7,500.00	\$7,500.00	\$7,500.00	\$0.00	\$0.00	\$0.00	\$0.00
WFAE 90.7 FM \$ 50,000.00 <i>A grant to help in improving WFAE's local news capacity over the next five years through the addition of new reporters who will provide coverage of local news in the areas of business, education, government, and the arts.</i>	\$10,000.00	\$10,000.00	\$10,000.00	\$10,000.00	\$0.00	\$0.00	\$0.00
Grand Total (11 items)	\$302,500.00	\$130,000.00	\$115,000.00	\$17,500.00	\$17,500.00	\$0.00	\$22,500.00

Part XV
Line 2



Grant Guidelines

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For Submitting Grant Proposals

HISTORY AND TYPES OF SUPPORT:

The Blumenthal Foundation was established in Charlotte, North Carolina in 1953. The Foundation provides grants for seed money, annual operating budgets, capital campaigns, conferences and seminars, special projects and endowments.

PURPOSES AND ACTIVITIES:

The Foundation considers grant requests from the Charlotte region in the following areas: Arts and Science, Civic and Community, Education, Environment, Foundation Affiliates, Health and Human Services, Jewish Religious, Religious, and Social Sciences.

ELIGIBILITY:

The present policy of the Foundation is to make grants only to non-profit, tax-exempt charitable organizations and institutions that are exempt under Section 501(c)(3) of the Internal Revenue Code or to a governmental agency. **No grants are made to individuals for any purpose.**

PROPOSAL CONTENTS:

A proposal should be brief and in letter form and should be signed by an authorized official of the petitioning organization. Only one copy of the proposal should be submitted. The first paragraph of the proposal should state the specific amount and the purpose of the request, and the proposal should contain:

1. A mission statement of the organization
2. A concise description of the program/project, and how it fits with the mission of the organization
3. Total cost of the program/project and duration.
4. Funds on hand or pledged from other sources.
5. Other sources being contacted for funding and for what amount.
6. A plan for evaluation stating the desired results and how they will be measured
7. The phone number where a contact person for the project may be reached during normal business hours.

8. Indicate to whom a check is to be made payable

ATTACHMENTS:

A line-item budget for the specific program/project for which funding is being requested, if applicable, and a budget for the organization's total operations including expected income and expenditures.

A list of the governing board of the petitioning organization.

A copy of the federal certification letter granting charitable status to the petitioning organization under Code Section 501(c)(3), except in the case of governmental agencies and churches.

DEADLINES:

The Board of Trustees of the Foundation meets quarterly to consider grant applications.

Please address all proposals to:

Mr Philip Blumenthal
BLUMENTHAL FOUNDATION
P.O. Box 34689
Charlotte, NC 28234-4689
Telephone: 704-688-2305
Fax: 704-688-2301
email: foundation@rscbrands.com

The Blumenthal Foundation
P.O. Box 34689
Charlotte, NC 28234-4689
704-688-2305 • 704-688-2301 (FAX)
e-mail: foundation@rscbrands.com

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