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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

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Information about Form 990-PF and its instructions is at [www.irs.gov/form990pf](http://www.irs.gov/form990pf).

OMB No 1545-0052

2014

Open to Public Inspection

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

Name of foundation RAYMUND FOUNDATION INC		A Employer identification number 59-3447494	
Number and street (or P O box number if mail is not delivered to street address) 5350 TECH DATA DRIVE		B Telephone number (see instructions) (727) 599-2630	
City or town, state or province, country, and ZIP or foreign postal code CLEARWATER, FL 33760		C If exemption application is pending, check here <input type="checkbox"/>	
G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address 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) \$ 4,001,690		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)			

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions) )		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule) . . . . .				
	2 Check <input checked="" type="checkbox"/> if the foundation is <b>not</b> required to attach Sch B . . . . .				
	3 Interest on savings and temporary cash investments	85	85		
	4 Dividends and interest from securities. . . . .	77,927	77,927		
	5a Gross rents . . . . .				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	62,719			
	b Gross sales price for all assets on line 6a 630,743				
	7 Capital gain net income (from Part IV, line 2) . . .		62,719		
	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) . . . . .				
Operating and Administrative Expenses	11 Other income (attach schedule) . . . . .	-19,031	1,222		
	12 <b>Total.</b> Add lines 1 through 11 . . . . .	121,700	141,953		
	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages . . . . .				
	15 Pension plans, employee benefits . . . . .				
	16a Legal fees (attach schedule) . . . . .				
	b Accounting fees (attach schedule) . . . . .	2,525			2,525
	c Other professional fees (attach schedule) . . . . .				
	17 Interest . . . . .				
	18 Taxes (attach schedule) (see instructions) . . .	921	921		
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy . . . . .				
	21 Travel, conferences, and meetings . . . . .				
	22 Printing and publications . . . . .				
	23 Other expenses (attach schedule) . . . . .	5,278	5,217		61
	24 <b>Total operating and administrative expenses.</b> Add lines 13 through 23 . . . . .	8,724	6,138		2,586
	25 Contributions, gifts, grants paid . . . . .	235,712			235,712
	26 <b>Total expenses and disbursements.</b> Add lines 24 and 25	244,436	6,138		238,298
	27 Subtract line 26 from line 12				
	a <b>Excess of revenue over expenses and disbursements</b>	-122,736			
	b <b>Net investment income</b> (if negative, enter -0-)		135,815		
	c <b>Adjusted net income</b> (if negative, enter -0-)				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions )	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing . . . . .	212,367	211,559	211,559
	2	Savings and temporary cash investments . . . . .			
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable . . . . .			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . .			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use . . . . .			
	9	Prepaid expenses and deferred charges . . . . .			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule) . . . . .	1,791,132	<input checked="" type="checkbox"/> 1,752,730	2,004,823
	c	Investments—corporate bonds (attach schedule). . . . .	678,901	<input checked="" type="checkbox"/> 621,016	606,179
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans . . . . .			
	13	Investments—other (attach schedule) . . . . .	1,184,080	<input checked="" type="checkbox"/> 1,146,292	1,179,129
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15	Other assets (describe ▶ _____)				
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	3,866,480	3,731,597	4,001,690	
Liabilities	17	Accounts payable and accrued expenses . . . . .			
	18	Grants payable . . . . .			
	19	Deferred revenue . . . . .			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule) . . . . .			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22) . . . . .		0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted . . . . .			
	25	Temporarily restricted . . . . .			
	26	Permanently restricted . . . . .			
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds . . . . .			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	3,866,480	3,731,597	
	30	Total net assets or fund balances (see instructions) . . . . .	3,866,480	3,731,597	
31	Total liabilities and net assets/fund balances (see instructions) . . . . .	3,866,480	3,731,597		

Part III Analysis of Changes in Net Assets or Fund Balances		
1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year’s return) . . . . .	1 3,866,480
2	Enter amount from Part I, line 27a . . . . .	2 -122,736
3	Other increases not included in line 2 (itemize) ▶ <input checked="" type="checkbox"/> _____	3 184
4	Add lines 1, 2, and 3 . . . . .	4 3,743,928
5	Decreases not included in line 2 (itemize) ▶ <input checked="" type="checkbox"/> _____	5 12,331
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 . . . . .	6 3,731,597

Part IV

Capital Gains and Losses for Tax on Investment Income

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

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(I) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a	See Additional Data Table		
b			
c			
d			
e			

2	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	62,719
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	-21,739

Part V

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

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

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

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

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2013	259,460	4,343,372	0 059737
2012	387,644	5,920,114	0 065479
2011	406,731	8,140,852	0 049962
2010	461,828	7,397,688	0 062429
2009	423,719	6,783,849	0 062460

2	Total of line 1, column (d). . . . .	2	0 300067
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years . . . .	3	0 060013
4	Enter the net value of noncharitable-use assets for 2014 from Part X, line 5. . . . .	4	4,419,292
5	Multiply line 4 by line 3. . . . .	5	265,215
6	Enter 1% of net investment income (1% of Part I, line 27b). . . . .	6	1,358
7	Add lines 5 and 6. . . . .	7	266,573
8	Enter qualifying distributions from Part XII, line 4. . . . .	8	238,298

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

Part VI

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

1a		Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1			
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	2,716
c		All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)			
2		Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	
3		Add lines 1 and 2. . . . .		3	2,716
4		Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	
5		Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- . . . . .		5	2,716
6		Credits/Payments			
a		2014 estimated tax payments and 2013 overpayment credited to 2014	6a	4,879	
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	4,879
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	2,163
11		Enter the amount of line 10 to be Credited to 2015 estimated tax <input type="checkbox"/> 2,163 Refunded <input type="checkbox"/>		11	

Part VII-A

Statements Regarding Activities

1a		During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? . . . . .		1a		No
b		Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)? . . . . . <i>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.</i>		1b		No
c		Did the foundation file Form 1120-POL for this year? . . . . .		1c		No
d		Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation <input type="checkbox"/> \$ (2) On foundation managers <input type="checkbox"/> \$				
e		Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$				
2		Has the foundation engaged in any activities that have not previously been reported to the IRS? . . . . . <i>If "Yes," attach a detailed description of the activities.</i>		2		No
3		Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes.</i> . . . . .		3		No
4a		Did the foundation have unrelated business gross income of \$1,000 or more during the year? . . . . .		4a		No
b		If "Yes," has it filed a tax return on Form 990-T for this year? . . . . .		4b		
5		Was there a liquidation, termination, dissolution, or substantial contraction during the year? . . . . . <i>If "Yes," attach the statement required by General Instruction T.</i>		5		No
6		Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument? . . . . .		6	Yes	
7		Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV.</i> . . . . .		7	Yes	
8a		Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> FL				
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? <i>If "No," attach explanation.</i> . . . . .		8b	Yes	
9		Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV.</i> . . . . .		9		No
10		Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i> . . . . .		10		No

Part VII-A

Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address N/A				
14	The books are in care of STEVEN RAYMUND Telephone no (727) 599-2630 Located at 5350 TECH DATA DRIVE CLEARWATER FL ZIP+4 33760			
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?	16	Yes	No
See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes", enter the name of the foreign country				

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person? Yes No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? Yes No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? Yes No (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days ). Yes No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here.	1b		
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? If "Yes," list the years 20 , 20 , 20 , 20 Yes No			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions ).	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here 20 , 20 , 20 , 20			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? Yes No			
b	If "Yes," did it have excess business holdings in 2014 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2014.).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2014?	4b		No

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

5aDuring 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

YesNo

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?. . . . .

Yes

YesNo

(3) Provide a grant to an individual for travel, study, or other similar purposes?

Yes

YesNo

(4) Provide a grant to an organization other than a charitable, etc , organization described in section 4945(d)(4)(A)? (see instructions). . . . .

Yes

YesNo

(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

YesNo

bIf 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)? . . . . .

Organizations relying on a current notice regarding disaster assistance check here. . . . .

cIf the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?. . . . .

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

6aDid the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?. . . . .

bDid the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?. . . . .

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

7aAt any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? 

Yes

YesNo

bIf yes, did the foundation receive any proceeds or have any net income attributable to the transaction? . . . . .

5b

6b

7b

No

Part VIIIInformation 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
STEVEN A RAYMUND 5350 TECH DATA DRIVE CLEARWATER, FL 33760	PRESIDENT 5 00	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
NONE				

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

Part VIII

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

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
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	
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 N/A	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3. . . . .	



Part X

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities. . . . .	1a	3,173,079
b	Average of monthly cash balances. . . . .	1b	116,085
c	Fair market value of all other assets (see instructions). . . . .	1c	1,197,427
d	Total (add lines 1a, b, and c). . . . .	1d	4,486,591
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	4,486,591
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions). . . . .	4	67,299
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	4,419,292
6	Minimum investment return. Enter 5% of line 5. . . . .	6	220,965

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	220,965
2a	Tax on investment income for 2014 from Part VI, line 5. . . . .	2a	2,716
b	Income tax for 2014 (This does not include the tax from Part VI ). . . . .	2b	
c	Add lines 2a and 2b. . . . .	2c	2,716
3	Distributable amount before adjustments Subtract line 2c from line 1. . . . .	3	218,249
4	Recoveries of amounts treated as qualifying distributions. . . . .	4	
5	Add lines 3 and 4. . . . .	5	218,249
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	218,249

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	238,298
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	238,298
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	238,298

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				218,249
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. . . . .	85,999			
b From 2010. . . . .	98,364			
c From 2011. . . . .	27,957			
d From 2012. . . . .	97,212			
e From 2013. . . . .	48,521			
f Total of lines 3a through e. . . . .	358,053			
4 Qualifying distributions for 2014 from Part XII, line 4 ▶ \$ 238,298				
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. . . . .				218,249
e Remaining amount distributed out of corpus	20,049			
5 Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	378,102			
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 . . . . .				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions). . . . .				
8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions). . .	85,999			
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a . . . . .	292,103			
10 Analysis of line 9				
a Excess from 2010. . . .	98,364			
b Excess from 2011. . . .	27,957			
c Excess from 2012. . . .	97,212			
d Excess from 2013. . . .	48,521			
e Excess from 2014. . . .	20,049			

Part XIV

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

1a

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

b

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

☐ 4942(j)(3) ☐ 4942(j)(5)

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

Part XV

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

1

Information Regarding Foundation Managers:

a

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

STEVEN A RAYMUND

b

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

2

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

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

a

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

RAYMUND FOUNDATION  
5350 TECH DATA DRIVE  
CLEARWATER, FL 33760  
(727) 599-2630  
N/A

b

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

LETTER HIGHLIGHTING ACTIVITIES OF ORGANIZATION

c

Any submission deadlines

NONE

d

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

NONE

Part XV

Supplementary Information (continued)

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

Recipient	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
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total . . . . .			3a	235,712
b Approved for future payment				
Total . . . . .			3b	

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2014)



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

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co )	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr )	(d) Date sold (mo , day, yr )
SEE SCHEDULE D ATTACHMENT JPMORGAN	P		
SEE SCHEDULE D ATTACHMENT JPMORGAN	P		
SEE SCHEDULE D ATTACHMENT JPMORGAN	P		
SEE SCHEDULE D ATTACHMENT JPMORGAN	P		
MULTI-STRATEGY SVL, LP	P		
MULTI-STRATEGY SVL, LP	P		
MULTI-STRATEGY SVL, LP	P		


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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
184,540		195,575	-11,035
44,974		55,693	-10,719
264,817		250,994	13,823
71,708		64,855	6,853
15			15
		907	-907
86			86

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


Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			-11,035
			-10,719
			13,823
			6,853
			15
			-907
			86

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

Recipient	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
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
AMERICAN HEART ASSOCIATION 2300 CENTRE PARK WEST DR ST PETERSBURG,FL 33716	N/A	PC	2014 TAMPA BAY HEART WALK	250
JEWISH FEDERATION OF PINELLAS & PAS 13191 STARKEY ROAD STE 8 LARGO,FL 33773	N/A	PC	2013-2014 ANNUAL CAMPAIGN	10,000
TAMPA JEWISH COMMUNITY CENTER & FED 13009 COMMUNITY CAMPUS DR TAMPA,FL 33625	N/A	PC	PRESIDENT'S CABINET SPONSOR	5,000
TEMPLE BETH EL 400 PASADENA AVE S ST PETERSBURG,FL 33707	N/A	PC	ART FESTIVAL	1,800
TEMPLE BETH EL 400 PASADENA AVE S ST PETERSBURG,FL 33707	N/A	PC	RAISE THE ROOF CAMPAIGN	33,333
TEMPLE BETH EL 400 PASADENA AVE S ST PETERSBURG,FL 33707	N/A	PC	TEMPLE TABLES FUNDRAISER DONATION	54
TEMPLE BETH EL 400 PASADENA AVE S ST PETERSBURG,FL 33707	N/A	PC	GENERAL OPERATING SUPPORT	10,000
THE TELLURIDE FOUNDATION 220 E COLORADO AVE 106 TELLURIDE,CO 81435	N/A	PC	GOLD HILL DONOR PLEDGE	10,000
UNITED WAY SUNCOAST 5201 W KENNEDY BLVD STE 600 TAMPA,FL 33609	N/A	PC	GENERAL OPERATING SUPPORT	10,000
UNIVERSITY OF MIAMI HILLEL 1100 STANFORD DRIVE CORAL GABLES,FL 33146	N/A	PC	GENERAL OPERATING SUPPORT	5,000
UNIVERSITY OF OREGON FOUNDATION 1585 E 13TH AVE EUGENE,OR 97403	N/A	PC	KNIGHT LAW - SUPPORT FOR THE ADR CTR	100,000
ALL CHILDREN'S HOSPITAL FOUNDATION 500 7TH AVE S 4TH FLOOR ST PETERSBURG,FL 33731	N/A	PC	GENERAL OPERATING SUPPORT	5,000
COMMUNITY TAMPA BAY 2727 ULMERTON RD SUITE 200 CLEARWATER,FL 33762	N/A	PC	GENERAL OPERATING SUPPORT	2,500
FAST PO BOX 10421 ST PETERSBURG,FL 33733	N/A	PC	GENERAL OPERATING SUPPORT	6,000
GULF COAST JEWISH FAMILY & COMM SER 14041 ICOT BLVD CLEARWATER,FL 33760	N/A	PC	2014 ANNUAL FACES GALA	25,000
<b>Total . . . . .</b>  <b>3a</b>				235,712



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

Recipient	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
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
LIFT ACADEMY LIFT INC 13400 PARK BLVD SEMINOLE,FL 33776	N/A	PC	2014 LIFT YOUR SPIRITS EVENT	500
MARCH OF DIMES 405 N REO ST STE 160 TAMPA,FL 33609	N/A	PC	2014 MARCH OF DIMES' WALK	75
MOFFITT CANCER CENTER FOUNDATION 12902 MAGNOLIA DRIVE UTC-FOUND TAMPA,FL 33612	N/A	PC	2014 MAGNOLIA BALL	10,000
MOFFITT CANCER CENTER FOUNDATION 12902 MAGNOLIA DRIVE UTC-FOUND TAMPA,FL 33612	N/A	PC	2014 MILES FOR MOFFITT RUN/WALK	200
PROJECT PROSPER 10300 49TH STREET N SUITE 403 CLEARWATER,FL 33762	N/A	PC	GENERAL OPERATING SUPPORT	1,000
<b>Total</b> . . . . .  <b>3a</b>				235,712

**TY 2014 Accounting Fees Schedule****Name:** RAYMUND FOUNDATION INC**EIN:** 59-3447494

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCTG FEES	2,525			2,525

# TY 2014 Investments Corporate Bonds Schedule

**Name:** RAYMUND FOUNDATION INC

**EIN:** 59-3447494

Name of Bond	End of Year Book Value	End of Year Fair Market Value
FIXED INCOME FUNDS	621,016	606,179

**TY 2014 Investments Corporate  
Stock Schedule**

**Name:** RAYMUND FOUNDATION INC  
**EIN:** 59-3447494

Name of Stock	End of Year Book Value	End of Year Fair Market Value
EQUITY FUNDS	1,752,730	2,004,823

## TY 2014 Investments - Other Schedule

**Name:** RAYMUND FOUNDATION INC

**EIN:** 59-3447494

Category / Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
MULTI-STRATEGY SLV, LP	AT COST	33,488	6,988
ABSOLUTE RETURN CAYMAN LTD	AT COST	1,112,804	1,172,141

TY 2014 Other Decreases Schedule

**Name:** RAYMUND FOUNDATION INC

**EIN:** 59- 3447494

Description	Amount
UNSETTLED TRANSACTIONS	12,331

# TY 2014 Other Expenses Schedule

**Name:** RAYMUND FOUNDATION INC

**EIN:** 59-3447494

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXPENSES				
MANAGEMENT FEES	4,668	4,668		
REGISTRATION	61			61
MULTI-STRATEGY LP	549	549		

**TY 2014 Other Income Schedule****Name:** RAYMUND FOUNDATION INC**EIN:** 59-3447494

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
CLASS ACTION PROCEEDS	1,221	1,221	
MULTI-STRATEGY SLV, LP	1	1	
MULTI-STRATEGY SLV, LP ORDRY	-35		
MULTI-STRATEGY SLV, LP OTHER	-7		
ABSOLUTE RETURN CAYMAN, LP	-20,211		



TY 2014 Other Increases Schedule

**Name:** RAYMUND FOUNDATION INC

**EIN:** 59- 3447494

Description	Amount
RETURN OF CAPITAL ADJUSTMENT	184

TY 2014 Taxes Schedule

**Name:** RAYMUND FOUNDATION INC

**EIN:** 59-3447494

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES PAID	921	921		



## Capital Gain and Loss Schedule

RAYMUND FOUNDATION INC  
Account Number A 20979-00-0

### Short-Term Covered

\* Code W indicates Wash Sale

L indicates a Nondeductible Loss other than a Wash Sale

\*\* Ordinary Income D indicates Ordinary Income gain or loss

F indicates Foreign Exchange gain or loss on Capital transactions

Stock and  
other symbol  
CUSIP

Description	Code*	Date Acquired Date Sold	Units	Sales Price	Cost or Other Basis	Adjustments to gain or loss	Gain or Loss Ordinary Income**
INV BALANCED-RISK ALLOC-Y	ABRY 00141V697	Various 03/25/14	1,679 260	20,083 95	21,457 41		-1,373 46
OAKMARK INTERNATIONAL FD-I	OAKI 413838202	01/23/14 12/16/14	1,247 637	30,641 97	33,000 00		-2,358 03
OPPENHEIMER DEVELOPING MKT-Y	ODVY 683974505	12/11/13 02/12/14	789 399	28,000 00	29,113 04		-1,113 04
OPPENHEIMER DEVELOPING MKT-Y	ODVY 683974505	12/11/13 03/12/14	783 269	27,962 70	28,886 96		-924 26
PIMCO EMERGING LOCAL BOND-P	PELP 72201M396	05/30/13 01/22/14	1,432 665	13,080 23	15,000 00		-1,919 77
PRUDENTIAL JENN M/C GROW-Z	PEGZ 74441C808	05/30/13 02/14/14	274 574	11,175 15	10,000 00		1,175 15
VANGUARD FTSE EUROPE ETF	VGK 922042874	11/14/13 10/10/14	404 000	20,990 81	22,795 70		-1,804 89
VANGUARD FTSE EUROPE ETF	VGK 922042874	11/14/13 10/10/14	292 000	15,170 37	16,476 10		-1,305 73
VANGUARD FTSE EUROPE ETF	VGK 922042874	11/14/13 10/13/14	334 000	17,434 61	18,845 95		-1,411 34
Total Short-Term Covered				184,539.79	195,575.16		-11,035.37



## Capital Gain and Loss Schedule

RAYMUND FOUNDATION INC  
Account Number A 20979-00-0

### Short-Term Noncovered

\* Code W indicates Wash Sale

L indicates a Nondeductible Loss other than a Wash Sale

\*\* Ordinary Income D indicates Ordinary Income gain or loss

F indicates Foreign Exchange gain or loss on Capital Transactions

Stock and  
other symbol  
Cusip

Description	Code*	Date Acquired Date Sold	Units	Sales Price	Cost or Other Basis	Adjustments to gain or loss	Gain or Loss Ordinary Income**
JPM ENHANCED BETA DAILY RETURN NOTE LNKD TO JBACDJUST MATURITY DATE 11/27/18 DD 11/22/13	48126NTE7	Various 11/21/14	38,000 000	34,496 55	40,693 26		-6,196 71
JPM LEV CONT BUFF EQ WTI 12/21/15 85% BARRIER - 10% CAP - 0% CPN 150% LEVERAGE - 15% MAX PAYMENT INITIAL LEVEL-9/26/14 CL1 93 54	48127DENV6	09/26/14 12/08/14	15,000 000	10,477 50	15,000 00		-4,522 50
<b>Total Short-Term Noncovered</b>				<b>44,974.05</b>	<b>55,693.26</b>		<b>-10,719.21</b>



RAYMUND FOUNDATION INC  
Account Number A 20979-00-0

## Capital Gain and Loss Schedule

### Long-Term Covered

\* Code W indicates Wash Sale  
L indicates a Nondeductible Loss other than a Wash Sale  
\*\* Ordinary Income D indicates Ordinary Income gain or loss  
F indicates Foreign Exchange gain or loss on Capital transactions  
Stock and other symbol Cusip

Description	Code*	Date Acquired Date Sold	Units	Sales Price	Cost or Other Basis	Adjustments to gain or loss	Gain or Loss Ordinary Income**
BBH CORE SELECT FUND-N	BBTE 05528X604	07/27/12 08/27/14	441 500	9,999 98	7,487 84		2,512 14
HARTFORD CAPITAL APPREC-I	ITHI 416649309	07/22/13 08/27/14	1,566 240	78,546 94	67,567 59		10,979 35
INV BALANCED-RISK ALLOC-Y	ABRY 00141V697	Various 08/15/14	2,612 830	33,104 56	33,278 82		-174 26
OAKMARK INTERNATIONAL FD-I	OAKI 413838202	Various 12/16/14	1,793 873	44,057 52	45,254 99		-1,197 47
PIMCO COMMODITYPL STRAT-P	PCLP 72201P167	07/27/12 01/22/14	571 970	6,034 28	5,965 65		68 63
PIMCO COMMODITYPL STRAT-P	PCLP 72201P167	07/27/12 08/27/14	4,921 800	53,549 18	51,334 38		2,214 80
PIMCO COMMODITYPL STRAT-P	PCLP 72201P167	07/27/12 10/02/14	1,194 030	11,892 54	12,453 73		-561 19
PIMCO EMERGING LOCAL BOND-P	PELP 72201M396	07/27/12 01/22/14	1,512 278	13,807 10	16,166 25		-2,359 15
PRUDENTIAL JENN M/C GROW-Z	PEGZ 74441C808	01/18/13 02/14/14	339 677	13,824 85	11,484 49		2,340 36

Total Long-Term Covered

264,816.95 250,993.74 13,823.21



## Capital Gain and Loss Schedule

RAYMUND FOUNDATION INC  
Account Number A 20979-00-0

### Long-Term Noncovered

\* Code W indicates Wash Sale

L indicates a Nondeductible Loss other than a Wash Sale

\*\* Ordinary Income D indicates Ordinary Income gain or loss

F indicates Foreign Exchange gain or loss on Capital transactions

Stock and  
other symbol  
CUSIP

Description	Code*	Date Acquired Date Sold	Units	Sales Price	Cost or Other Basis	Adjustments to gain or loss	Gain or Loss Ordinary Income**
EATON VANCE FLOATING RATE-I	EIBL 277911491	09/09/10 06/09/14	6,033 610	55,207 53	52,655 39		2,552 14
MATTHEWS PACIFIC TIGER FD-IS	MIPT 577130834	05/24/10 02/12/14	674 571	16,500 00	12,199 55		4,300 45
Total Long-Term Noncovered				71,707.53	64,854.94		6,852.59