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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 JAMES R MEADOWS JR FOUNDATION		<b>A Employer identification number</b>  62-1545923	
Number and street (or P O box number if mail is not delivered to street address) 408 HYDE PARK		<b>B Telephone number</b> (see instructions)  (615) 515-1700	
City or town, state or province, country, and ZIP or foreign postal code NASHVILLE, TN 372152449		<b>C</b> If exemption application is pending, check here <input type="checkbox"/>	
<b>G</b> 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		<b>D 1.</b> Foreign organizations, check here <input type="checkbox"/> <b>2.</b> Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
<b>H</b> 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		<b>E</b> If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
<b>I</b> Fair market value of all assets at end of year (from Part II, col. (c), line 16)▶\$ 20,075,150		<b>F</b> If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
<b>J</b> 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 <i>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions) )</i>		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	<b>1</b> Contributions, gifts, grants, etc , received (attach schedule) . . . . .	546,557			
	<b>2</b> Check <input type="checkbox"/> if the foundation is <b>not</b> required to attach Sch B . . . . .				
	<b>3</b> Interest on savings and temporary cash investments	129,848	129,848		
	<b>4</b> Dividends and interest from securities. . . . .	268,010	268,010		
	<b>5a</b> Gross rents . . . . .				
	<b>b</b> Net rental income or (loss) _____				
	<b>6a</b> Net gain or (loss) from sale of assets not on line 10	511,895			
	<b>b</b> Gross sales price for all assets on line 6a 1,971,287				
	<b>7</b> Capital gain net income (from Part IV, line 2) . . .		511,895		
	<b>8</b> Net short-term capital gain . . . . .				
	<b>9</b> Income modifications . . . . .				
	<b>10a</b> Gross sales less returns and allowances				
	<b>b</b> Less Cost of goods sold . . . . .				
	<b>c</b> Gross profit or (loss) (attach schedule) . . . . .				
	<b>11</b> Other income (attach schedule) . . . . .	49,103	49,103		
	<b>12 Total.</b> Add lines 1 through 11 . . . . .	1,505,413	958,856		
Operating and Administrative Expenses	<b>13</b> Compensation of officers, directors, trustees, etc	0	0		0
	<b>14</b> Other employee salaries and wages . . . . .				
	<b>15</b> Pension plans, employee benefits . . . . .				
	<b>16a</b> Legal fees (attach schedule) . . . . .	4,545	0		0
	<b>b</b> Accounting fees (attach schedule) . . . . .	9,644	4,822		0
	<b>c</b> Other professional fees (attach schedule) . . . . .	63	63		0
	<b>17</b> Interest . . . . .				
	<b>18</b> Taxes (attach schedule) (see instructions) . . .	13,000	0		0
	<b>19</b> Depreciation (attach schedule) and depletion . . .				
	<b>20</b> Occupancy . . . . .				
	<b>21</b> Travel, conferences, and meetings . . . . .				
	<b>22</b> Printing and publications . . . . .				
	<b>23</b> Other expenses (attach schedule) . . . . .	254,080	254,079		1
	<b>24 Total operating and administrative expenses.</b> Add lines 13 through 23 . . . . .	281,332	258,964		1
	<b>25</b> Contributions, gifts, grants paid . . . . .	505,250			505,250
	<b>26 Total expenses and disbursements.</b> Add lines 24 and 25	786,582	258,964		505,251
	<b>27</b> Subtract line 26 from line 12				
	<b>a Excess of revenue over expenses and disbursements</b>	718,831			
	<b>b Net investment income</b> (if negative, enter -0-)		699,892		
	<b>c 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 . . . . .	231,119	54,434	54,434
	2	Savings and temporary cash investments . . . . .	4,646,845	2,536,279	2,536,279
	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)	42,165	37,135	41,264
	b	Investments—corporate stock (attach schedule) . . . . .	9,476,127	12,191,325	13,616,170
	c	Investments—corporate bonds (attach schedule). . . . .	3,482,482	3,781,190	3,827,003
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans . . . . .			
	13	Investments—other (attach schedule) . . . . .			
	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)	17,878,738	18,600,363	20,075,150	
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	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 . . . . .	0	0	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
	29	Retained earnings, accumulated income, endowment, or other funds	17,878,738	18,600,363	
	30	Total net assets or fund balances (see instructions) . . . . .	17,878,738	18,600,363	
31	Total liabilities and net assets/fund balances (see instructions) . . .	17,878,738	18,600,363		

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	17,878,738
2	Enter amount from Part I, line 27a . . . . .	2	718,831
3	Other increases not included in line 2 (itemize) ▶ _____	3	2,826
4	Add lines 1, 2, and 3 . . . . .	4	18,600,395
5	Decreases not included in line 2 (itemize) ▶ _____	5	32
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	18,600,363

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	511,895
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)  If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8 . . . . .	}	3	

Part V

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

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

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

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

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2013	160,750	9,481,629	0 016954
2012	81,000	547,789	0 147867
2011	0	0	0 000000
2010	0	0	0 000000
2009	0	0	0 000000

2	Total of line 1, column (d). . . . .	2	0 164821
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 032964
4	Enter the net value of noncharitable-use assets for 2014 from Part X, line 5. . . . .	4	19,020,541
5	Multiply line 4 by line 3. . . . .	5	626,993
6	Enter 1% of net investment income (1% of Part I, line 27b). . . . .	6	6,999
7	Add lines 5 and 6. . . . .	7	633,992
8	Enter qualifying distributions from Part XII, line 4. . . . .	8	505,251

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		
	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	13,998
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0
3	Add lines 1 and 2. . . . .	3	13,998
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0
5	<b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0- . . . . .	5	13,998
6	Credits/Payments		
a	2014 estimated tax payments and 2013 overpayment credited to 2014	6a	14,255
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	14,255
8	Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	
9	<b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b> . . . . . <input type="checkbox"/>	9	
10	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b> . . . . . <input type="checkbox"/>	10	257
11	Enter the amount of line 10 to be <b>Credited to 2015 estimated tax</b> <input type="checkbox"/> 257 <b>Refunded</b> <input type="checkbox"/>	11	0

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		Yes	No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)? . . . . .	1b			No
	<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>				
c	Did the foundation file <b>Form 1120-POL</b> for this year? . . . . .	1c			No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: <b>(1)</b> On the foundation <input type="checkbox"/> \$ <u>0</u> <b>(2)</b> On foundation managers <input type="checkbox"/> \$ <u>0</u>				
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ <u>0</u>				
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		Yes	
b	If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year? . . . . .	4b		Yes	
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"/> TN				
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> <input type="checkbox"/> . . . . .	10		Yes	

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 PATRICIA MEADOWS Telephone no (615) 832-7000 Located at 408 HYDE PARK NASHVILLE TN ZIP+4 37215			
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		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014?. If "Yes," list the years 20 , 20 , 20 , 20			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions ).	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here 20 , 20 , 20 , 20			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?. Yes No			
b	If "Yes," did it have excess business holdings in 2014 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2014.).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2014?	4b		No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a

During the year did the foundation pay or incur any amount to

(1)

Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

Yes

✓

No

(2)

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

Yes

✓

No

(3)

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

Yes

✓

No

(4)

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

Yes

✓

No

(5)

Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

Yes

✓

No

b

If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

5b

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

✓

c

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

YesNo

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

6a

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

Yes

✓

No

b

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

6b

No

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

7a

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

Yes

✓

No

b

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

7b

Part VIII

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

1

List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
PATRICIA MEADOWS 636 GRASSMERE PARK DRIVE NASHVILLE,TN 37215	PRESIDENT/DIRECTOR 10 00	0	0	0
PAUL STUMB 636 GRASSMERE PARK DRIVE NASHVILLE,TN 37205	SECRETARY/DIRECTOR 0 50	0	0	0
RIDLEY WILLS II 636 GRASSMERE PARK DRIVE NASHVILLE,TN 37215	DIRECTOR 0 50	0	0	0
BETTY CHILES NIXON 636 GRASSMERE PARK DRIVE NASHVILLE,TN 37215	DIRECTOR 0 50	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.

0

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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. . . . .		0

Part IX-A

Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1 N/A	0
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see instructions)

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



Part X

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities. . . . .	1a	16,786,027
b	Average of monthly cash balances. . . . .	1b	2,524,167
c	Fair market value of all other assets (see instructions). . . . .	1c	0
d	Total (add lines 1a, b, and c). . . . .	1d	19,310,194
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation). . . . .	1e	0
2	Acquisition indebtedness applicable to line 1 assets. . . . .	2	0
3	Subtract line 2 from line 1d. . . . .	3	19,310,194
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions). . . . .	4	289,653
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	19,020,541
6	Minimum investment return. Enter 5% of line 5. . . . .	6	951,027

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	951,027
2a	Tax on investment income for 2014 from Part VI, line 5. . . . .	2a	13,998
b	Income tax for 2014 (This does not include the tax from Part VI ). . . . .	2b	5,003
c	Add lines 2a and 2b. . . . .	2c	19,001
3	Distributable amount before adjustments Subtract line 2c from line 1. . . . .	3	932,026
4	Recoveries of amounts treated as qualifying distributions. . . . .	4	0
5	Add lines 3 and 4. . . . .	5	932,026
6	Deduction from distributable amount (see instructions). . . . .	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1. . . . .	7	932,026

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	505,251
b	Program-related investments—total from Part IX-B. . . . .	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes. . . . .	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required). . . . .	3a	
b	Cash distribution test (attach the required schedule). . . . .	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	505,251
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	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4. . . . .	6	505,251
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				932,026
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only. . . . .			244,957	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2014				
a From 2009. . . . .				
b From 2010. . . . .				
c From 2011. . . . .				
d From 2012. . . . .				
e From 2013. . . . .				
f Total of lines 3a through e. . . . .	0			
4 Qualifying distributions for 2014 from Part XII, line 4 ▶ \$ 505,251				
a Applied to 2013, but not more than line 2a			244,957	
b Applied to undistributed income of prior years (Election required—see instructions). . . . .		0		
c Treated as distributions out of corpus (Election required—see instructions). . . . .	0			
d Applied to 2014 distributable amount. . . . .				260,294
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0			
b Prior years' undistributed income Subtract line 4b from line 2b. . . . .		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed. . . . .		0		
d Subtract line 6c from line 6b Taxable amount—see instructions . . . . .		0		
e Undistributed income for 2013 Subtract line 4a from line 2a Taxable amount—see instructions . . . . .			0	
f Undistributed income for 2014 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015 . . . . .				671,732
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions). . . . .	0			
8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions). . . .	0			
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a . . . . .	0			
10 Analysis of line 9				
a Excess from 2010. . . .				
b Excess from 2011. . . .				
c Excess from 2012. . . .				
d Excess from 2013. . . .				
e Excess from 2014. . . .				

Part XIVPrivate 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) or ☐ 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 XVSupplementary 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) )

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

TRUXTON TRUST  
4525 HARDING ROAD SUITE 300  
NASHVILLE, TN 37205  
(615) 515-1700

b

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

APPLICATIONS SHOULD BE SUBMITTED IN WRITING WITH THREE YEAR FINANCIAL PLAN

c

Any submission deadlines

JUNE 30

d

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

N/A

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	505,250
b Approved for future payment				
Total . . . . .			3b	0

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2014)

Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

Yes	No
-----	----

**No**

**a** Transfers from the reporting foundation to a noncharitable exempt organization of

(1) Cash. . . . .

**1a(1)**

No

**(2) Other assets.** . . . . .

**1a(2)**

**No**

**b Other transactions**

**(1) Sales of assets to a noncharitable exempt organization.** . . . . .

**1b(1)**

**No**

**(2) Purchases of assets from a noncharitable exempt organization.** . . . . .

**1b(2)**

**No**

**(3) Rental of facilities, equipment, or other assets.** . . . . .

**1b(3)**

**No**

**(4) Reimbursement arrangements.** . . . . .

**1b(4)**

No

**(5) Loans or loan guarantees.** . . . . .

**1b(5)**

**No**

**(6)** Performance of services or membership or fundraising solicitations. . . . .

**1b(6)**

**No**

**c** Sharing of facilities, equipment, mailing lists, other assets, or paid employees.

**1c**

**No**

**d** If the answer to any of the above is "Yes," complete the following schedule. Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received.

**2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? . . . ☐ Yes ☒ No

**b** If "Yes," complete the following schedule

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

<p>*****</p> <p>_____</p> <p>Signature of officer or trustee</p>	<p>2015-11-11</p> <p>_____</p> <p>Date</p>	<p>*****</p> <p>_____</p> <p>Title</p>
--	--	--

May the IRS discuss this return with the preparer shown below (see instr )? ☒ Yes ☐ No

**Sign  
Here**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

\* \* \* \* \*

2015-11-11

\* \* \* \* \*

Signature of officer or trustee

Date

Title

May the IRS discuss this return with the preparer shown below (see instr)? ☒ Yes ☐ No

☒ Yes ☐ No

**Paid  
Preparer  
Use  
Only**

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 )
5 79 UNITS FEDERAL HOME LOAN MORTGAGE	D	2012-04-30	2014-01-15
118 SHARES PRUDENTIAL FINANCIAL INC	P	2014-01-01	2014-01-07
200 SHARES NEW YORK COMMUNITY BANCORP INC	P	2014-01-01	2014-01-30
US SERIES EE BONDS	D	2012-04-30	2014-02-01
104 SHARES RAYTHEON CO	P	2014-01-01	2014-02-10
170 SHARES AUTOMATIC DATA PROCESSING INC	P	2014-01-01	2014-02-10
282 SHARES BANK OF MONTREAL COMMON	P	2014-01-01	2014-02-10
438 SHARES BRISTOL-MYERS SQUIBB CO	P	2014-01-01	2014-02-10
227 SHARES CAN IMPERIAL BK OF COMMERCE COMMON	P	2014-01-01	2014-02-10
209 SHARES DARDEN RESTAURANTS INC	P	2014-01-01	2014-02-10

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)
6		11	-5
10,813		9,500	1,313
3,261		3,243	18
100		100	0
9,687		9,499	188
12,637		13,208	-571
17,722		18,441	-719
22,789		21,796	993
17,992		18,355	-363
10,100		10,349	-249

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	
			-5
			1,313
			18
			0
			188
			-571
			-719
			993
			-363
			-249

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 )
24 7 UNITS FEDERAL HOME LOAN MORTGAGE	D	2012-04-30	2014-02-18
9 02 UNITS FEDERAL HOME LOAN MORTGAGE	D	2012-04-30	2014-03-17
123 SHARES ILLINOIS TOOL WORKS INC	P	2014-01-01	2014-03-03
US SERIES EE BONDS	D	2012-04-30	2014-03-01
2,734 SHARES ISHARES MSCI EMERGING MARKETS ETF	P	2014-01-01	2014-03-18
10 82 UNITS FEDERAL HOME LOAN MORTGAGE CORP	D	2012-04-30	2014-04-15
US SERIES EE BONDS	D	2012-04-30	2014-04-01
US SERIES EE BONDS	D	2012-04-30	2014-05-01
205 SHARES COLGATE-PALMOLIVE CO	P	2014-01-01	2014-04-30
67 SHARES LOCKHEED MARTIN CORP	P	2014-01-01	2014-05-02

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)
25		46	-21
9		17	-8
10,061		9,692	369
100		100	0
106,885		114,491	-7,606
11		20	-9
100		100	0
100		100	0
13,765		13,592	173
10,966		10,854	112

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			-21
			-8
			369
			0
			-7,606
			-9
			0
			0
			173
			112



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 )
727 SHARES NOBLE CORP PLC	P	2014-01-01	2014-05-22
652 SHARES LINEAR TECHNOLOGY CORP	P	2014-01-01	2014-05-23
7 57 UNITS OF FEDERAL HOME LOAN MORTGAGE CORP	D	2012-04-30	2014-05-15
5 72 UNITS OF FEDERAL HOME LOAN MORTGAGE	D	2012-04-30	2014-06-16
30000 SHARES PEOPLE'S UNITED FINANCIAL INC	D	2012-04-30	2014-05-29
32,500 SHARES ORITANI FINL CORP	D	2012-04-30	2014-05-29
US SERIES EE BONDS	D	2012-04-30	2014-06-01
25 SHARES NOW INC COMMON	P	2013-10-28	2014-06-02
86 SHARES NOW INC COMMON	P	2014-01-01	2014-06-13
9 69 UNITS FEDERAL HOME LOAN MORTGAGE CORP	D	2012-04-30	2014-07-15

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)
22,342		23,614	-1,272
29,984		28,948	1,036
8		14	-6
6		11	-5
429,881		370,762	59,119
489,026		485,063	3,963
100		100	0
9		8	1
2,902		2,647	255
10		18	-8

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	
			-1,272
			1,036
			-6
			-5
			59,119
			3,963
			0
			1
			255
			-8

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 )
US SERIES EE BONDS	D	2012-04-30	2014-07-01
548 SHARES ELI LILLY & CO	P	2014-01-01	2014-07-28
6 50 UNITS FEDERAL HOME LOAN MORTGAGE CORP	D	2012-04-30	2014-08-15
US SERIES EE BONDS	D	2012-04-30	2014-08-01
182 75 SHARES OAKMARK SELECT	D	2012-04-30	2014-08-05
101 322 SHARES HENNESSY SMALL CAP FINANCIAL INVESTOR	D	2012-04-30	2014-08-05
85 728 SHARES HENNESSY LARGE CAP FINANCIAL INVESTOR	D	2012-04-30	2014-08-05
400434 SHARES VERITIV CORP COM	P	2014-05-02	2014-07-02
286 SHARES FIRST OPPORTUNITY FUND INC	D	2012-04-30	2014-08-05
10 SHARES VERITIV CORP COMMON	P	2014-05-02	2014-08-08

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)
100		100	0
34,659		30,056	4,603
7		12	-5
100		100	0
8,068		5,936	2,132
2,314		1,846	468
1,698		1,193	505
14		14	0
2,764		2,077	687
385		344	41

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			0
			4,603
			-5
			0
			2,132
			468
			505
			0
			687
			41

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 )
1,048 INTEL CORP	P	2014-01-01	2014-08-22
5 89 UNITS FEDERAL HOME LOAN MORTGAGE CORP	D	2012-04-30	2014-09-15
US SERIES EE BONDS	D	2012-04-30	2014-09-01
254 SHARES CHEVRON CORP	P	2014-01-01	2014-09-03
150 SHARES STERICYCLE INC	P	2014-01-01	2014-09-03
16 83 UNITS FEDERAL HOME LOAN MORTGAGE CORP	D	2012-04-30	2014-10-15
US SERIES EE BONDS	D	2012-04-30	2014-10-01
113 666667 SHARES CDK GLOBAL INC COMMON	P	2014-01-01	2014-10-20
43 333333 SHARES CDK GLOBAL INC COMMON	P	2012-04-30	2014-10-20
13 74 UNITS FEDERAL HOME LOAN MORTGAGE	D	2012-04-30	2014-11-17

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)
36,712		26,048	10,664
6		11	-5
100		100	0
32,532		30,851	1,681
17,683		17,128	555
17		32	-15
100		100	0
3,065		3,225	-160
1,168		1,173	-5
14		26	-12

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	
			10,664
			-5
			0
			1,681
			555
			-15
			0
			-160
			-5
			-12

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 )
US SERIES EE BONDS	D	2012-04-30	2014-11-01
625 SHARES HALYARD HEALTH INC COMMON	P	2014-04-15	2014-11-03
27 25 SHARES HALYARD HEALTH INC COMMON	P	2014-01-01	2014-11-14
10 75 SHARES HALYARD HEALTH INC COMMON	P	2012-04-30	2014-11-14
6295 302 SHARES GOLDMAN SACHS COMMODITY STRATEGY INSTL	P	2014-01-30	2014-11-25
5088 945 SHARES GOLDMAN SACHS COMMODITY STRATEGY INSTL	P	2013-09-25	2014-11-25
1127 884 SHARES GOLDMAN SACHS COMMODITY STRATEGY INSTL	P	2013-11-06	2014-11-25
7 16 UNITS FEDERAL HOME LOAN MORTGAGE CORP	D	2012-04-30	2014-12-15
870 SHARES MAXIM INTEGRATED PRODUCTS INC	P	2014-05-23	2014-11-25
US SERIES EE BONDS	D	2012-04-30	2014-12-01

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)
100		100	0
24		23	1
1,022		977	45
403		353	50
29,588		35,002	-5,414
23,918		28,651	-4,733
5,301		6,203	-902
7		13	-6
25,146		29,813	-4,667
100		100	0

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			0
			1
			45
			50
			-5,414
			-4,733
			-902
			-6
			-4,667
			0

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

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co )	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr )	(d) Date sold (mo , day, yr )
279 SHARES DEVON ENERGY CORP	P	2014-01-01	2014-12-11
335 SHARES NATIONAL OILWELL VARCO INC	P	2014-01-01	2014-12-11
61 SHARES DEVON ENERGY CORP	P	2012-04-30	2014-12-11
47 SHARES NATIONAL OILWELL VARCO INC	P	2012-04-30	2014-12-11
3,002 SHARES EQUITY BANCSHARES INC COMMON	D	2012-04-30	2014-04-17
US SERIES EE BONDS	D	2012-04-30	2014-07-01
PARTNERSHIP K-1 ITEMS	D	2014-01-01	2014-12-31
PARTNERSHIP K-1 ITEMS	D	2012-04-30	2014-12-31
PARTNERSHIP K-1 ITEMS	D	2012-04-30	2014-12-31


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)
15,087		17,969	-2,882
21,074		23,821	-2,747
3,299		3,876	-577
2,957		3,446	-489
39,026		20,000	19,026
3,974		3,974	0
62,031			62,031
374,929			374,929
398			398


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	
			-2,882
			-2,747
			-577
			-489
			19,026
			0
			62,031
			374,929
			398


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>				
PEABODY 230 APPLETON PLACE BAKER BLDG ROOM 1000 NASHVILLE,TN 37203		PUBLIC CHARITY	FOR USE IN THE ORGANIZATION'S EXEMPT FUNCTION	10,000
CASA 601 WOODLAND ST NASHVILLE,TN 37206		PUBLIC CHARITY	FOR USE IN THE ORGANIZATION'S EXEMPT FUNCTION	5,000
CUMBERLAND HEIGHTS PO BOX 90727 NASHVILLE,TN 37209		PUBLIC CHARITY	FOR USE IN THE ORGANIZATION'S EXEMPT FUNCTION	1,250
FISK UNIVERSITY 1000 17TH AVENUE N NASHVILLE,TN 37208		PUBLIC CHARITY	FOR USE IN THE ORGANIZATION'S EXEMPT FUNCTION	63,000
ABE'S GARDEN 618 CHURCH STREET SUITE 220 NASHVILLE,TN 37219		PUBLIC CHARITY	FOR USE IN THE ORGANIZATION'S EXEMPT FUNCTION	10,000
MARTHA O'BRYAN CENTER 711 S 7TH ST NASHVILLE,TN 37206		PUBLIC CHARITY	FOR USE IN THE ORGANIZATION'S EXEMPT FUNCTION	5,000
ALIVE HOSPICE 1718 PATTERSON STREET NASHVILLE,TN 37203		PUBLIC CHARITY	FOR USE IN THE ORGANIZATION'S EXEMPT FUNCTION	10,000
MONROE HARDING 1120 GLENDALE LANE NASHVILLE,TN 37204		PUBLIC CHARITY	FOR USE IN THE ORGANIZATION'S EXEMPT FUNCTION	3,000
MONTGOMERY BELL ACADEMY 4001 HARDING PIKE NASHVILLE,TN 37205		PUBLIC CHARITY	FOR USE IN THE ORGANIZATION'S EXEMPT FUNCTION	26,000
NASHVILLE HUMANE ASSOCIATION 213 OCEOLA AVENUE NASHVILLE,TN 37209		PUBLIC CHARITY	FOR USE IN THE ORGANIZATION'S EXEMPT FUNCTION	5,000
BELCOURT 2102 BELCOURT AVENUE NASHVILLE,TN 37212		PUBLIC CHARITY	FOR USE IN THE ORGANIZATION'S EXEMPT FUNCTION	1,000
NASHVILLE PUBLIC TELEVISION 161 RAINS AVENUE NASHVILLE,TN 37203		PUBLIC CHARITY	FOR USE IN THE ORGANIZATION'S EXEMPT FUNCTION	5,000
BLUE MONARCH PO BOX 1207 MONTEAGLE,TN 37356		PUBLIC CHARITY	FOR USE IN THE ORGANIZATION'S EXEMPT FUNCTION FOR USE IN THE ORGANIZATION'S EXEMPT FUNCTION	14,000
CAMPUS FOR HUMAN DEVELOPMENT 705 DREXEL STREET NASHVILLE,TN 37203		PUBLIC CHARITY	FOR USE IN THE ORGANIZATION'S EXEMPT FUNCTION	5,000
RAPHA HOUSE PO BOX 1569 JOPLIN,MO 64802		PUBLIC CHARITY	FOR USE IN THE ORGANIZATION'S EXEMPT FUNCTION	1,000
<b>Total . . . . .</b>  <b>3a</b>				505,250

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> Paid during the year				
SALVATION ARMY PO BOX 78625 NASHVILLE,TN 37207		PUBLIC CHARITY	FOR USE IN THE ORGANIZATION'S EXEMPT FUNCTION	10,000
SECOND HARVEST FOOD 331 GREAT CIRCLE RD NASHVILLE,TN 37228		PUBLIC CHARITY	FOR USE IN THE ORGANIZATION'S EXEMPT FUNCTION	45,000
SILOAM 820 GALE LANE NASHVILLE,TN 37204		PUBLIC CHARITY	FOR USE IN THE ORGANIZATION'S EXEMPT FUNCTION	23,000
ST JUDE CHILDREN'S RESEARCH HOSPITAL 501 ST JUDE PLACE MEMPHIS,TN 38105		PUBLIC CHARITY	FOR USE IN THE ORGANIZATION'S EXEMPT FUNCTION	1,000
CHEEKWOOD 1200 FORREST PARK DRIVE NASHVILLE,TN 37205		PUBLIC CHARITY	FOR USE IN THE ORGANIZATION'S EXEMPT FUNCTION	1,000
THE LAND TRUST FOR TENNESSEE 209 10TH AVE SOUTH SUITE 511 NASHVILLE,TN 37203		PUBLIC CHARITY	FOR USE IN THE ORGANIZATION'S EXEMPT FUNCTION	1,000
FRIST CENTER FOR THE VISUAL ARTS 919 BROADWAY NASHVILLE,TN 37203		PUBLIC CHARITY	FOR USE IN THE ORGANIZATION'S EXEMPT FUNCTION	1,000
INTERFAITH DENTAL CLINIC 1721 PATTERSON STREET NASHVILLE,TN 37203		PUBLIC CHARITY	FOR USE IN THE ORGANIZATION'S EXEMPT FUNCTION	1,000
UNITED WAY OF METROPOLITAN NASHVILLE 250 VENTURE CIRCLE NASHVILLE,TN 37228		PUBLIC CHARITY	FOR USE IN THE ORGANIZATION'S EXEMPT FUNCTION	10,000
TENNESSEE HISTORICAL SOCIETY 305 6TH AVENUE NORTH GROUND FLOOR WAR MEMORIAL NASHVILLE,TN 37243		PUBLIC CHARITY	FOR USE IN THE ORGANIZATION'S EXEMPT FUNCTION	5,000
THE BRIDGE PO BOX 463 GOODLETTSVILLE,TN 37070		PUBLIC CHARITY	FOR USE IN THE ORGANIZATION'S EXEMPT FUNCTION	1,000
WESTMINSTER PRESBYTERIAN CHURCH 3900 WEST END AVENUE NASHVILLE,TN 37205		PUBLIC CHARITY	FOR USE IN THE ORGANIZATION'S EXEMPT FUNCTION	10,000
YOUTH ENCOURAGEMENT SERVICES 521 MCIVER STREET NASHVILLE,TN 37211		PUBLIC CHARITY	FOR USE IN THE ORGANIZATION'S EXEMPT FUNCTION	5,000
YWCA 1608 WOODMONT BLVD NASHVILLE,TN 37215		PUBLIC CHARITY	FOR USE IN THE ORGANIZATION'S EXEMPT FUNCTION	35,000
TN COALITION FOR OPEN GOVERNMENT PO BOX 22248 NASHVILLE,TN 37202		PUBLIC CHARITY	FOR USE IN THE ORGANIZATION'S EXEMPT FUNCTION	1,000
<b>Total . . . . .</b>  <b>3a</b>				505,250

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>				
TN JUSTICE CENTER 301 CHARLOTTE AVENUE NASHVILLE,TN 37201		PUBLIC CHARITY	FOR USE IN THE ORGANIZATION'S EXEMPT FUNCTION	5,000
WO SMITH MUSIC SCHOOL 1125 8TH AVENUE SOUTH NASHVILLE,TN 37203		PUBLIC CHARITY	FOR USE IN THE ORGANIZATION'S EXEMPT FUNCTION	5,000
WPLN 630 MAINSTREAM DRIVE NASHVILLE,TN 37228		PUBLIC CHARITY	FOR USE IN THE ORGANIZATION'S EXEMPT FUNCTION	5,000
YALE UNIVERSITY PO BOX 2039 NASHVILLE,TN 065212038		PUBLIC CHARITY	FOR USE IN THE ORGANIZATION'S EXEMPT FUNCTION	10,000
BILL WILKERSONMAMA LERE 1215 21ST AVE S NASHVILLE,TN 37232		PUBLIC CHARITY	FOR USE IN THE ORGANIZATION'S EXEMPT FUNCTION	5,000
PRESTON TAYLOR MINISTRIES 4014 INDIANA AVE NASHVILLE,TN 37209		PUBLIC CHARITY	FOR USE IN THE ORGANIZATION'S EXEMPT FUNCTION	10,000
WEBB SCHOOL 319 WEBB RD E BELL BUCKLE,TN 37020		PUBLIC CHARITY	FOR USE IN THE ORGANIZATION'S EXEMPT FUNCTION	110,000
DOWNTOWN PRESBYTERIAN CHURCH 154 5TH AVE N NASHVILLE,TN 37219		PUBLIC CHARITY	FOR USE IN THE ORGANIZATION'S EXEMPT FUNCTION	5,000
CAMBRIDGE IN AMERICA 292 MADISON AVENUE NEWYORK,NY 10017		PUBLIC CHARITY	FOR USE IN THE ORGANIZATION'S EXEMPT FUNCTION	15,000
HARPETH HALL SCHOOL 3801 HOBBS RD NASHVILLE,TN 37215		PUBLIC CHARITY	FOR USE IN THE ORGANIZATION'S EXEMPT FUNCTION	5,000
THE CONTRIBUTOR PO BOX 332023 NASHVILLE,TN 37203		PUBLIC CHARITY	FOR USE IN THE ORGANIZATION'S EXEMPT FUNCTION	10,000
MEN OF VALOR 1410 DONELSON PIKE SUITE B-1 NASHVILLE,TN 37217		PUBLIC CHARITY	FOR USE IN THE ORGANIZATION'S EXEMPT FUNCTION	5,000
TN WOMEN'S THEATER PROJECT PO BOX 158525 NASHVILLE,TN 37215		PUBLIC CHARITY	FOR USE IN THE ORGANIZATION'S EXEMPT FUNCTION	1,000
<b>Total . . . . .</b>  <b>3a</b>				505,250



**TY 2014 Accounting Fees Schedule**

**Name:** JAMES R MEADOWS JR FOUNDATION

**EIN:** 62-1545923

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING	9,644	4,822		0

**TY 2014 Investments Corporate  
Bonds Schedule**

**Name:** JAMES R MEADOWS JR FOUNDATION  
**EIN:** 62-1545923

Name of Bond	End of Year Book Value	End of Year Fair Market Value
TRUXTON TRUST COMPANY	3,781,190	3,827,003

**TY 2014 Investments Corporate  
Stock Schedule****Name:** JAMES R MEADOWS JR FOUNDATION**EIN:** 62-1545923

<b>Name of Stock</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
SECURITIES HELD IN PARTNERSHIPS	4,233,087	4,719,350
TRUXTON TRUST COMPANY	7,953,238	8,891,820
MD FINANCIAL	5,000	5,000
EQUITY BANCSHARES	0	0

# TY 2014 Investments Government Obligations Schedule

**Name:** JAMES R MEADOWS JR FOUNDATION

**EIN:** 62-1545923

<b>US Government Securities - End of Year Book Value:</b>	37,135
<b>US Government Securities - End of Year Fair Market Value:</b>	41,264
<b>State &amp; Local Government Securities - End of Year Book Value:</b>	0
<b>State &amp; Local Government Securities - End of Year Fair Market Value:</b>	0

TY 2014 Legal Fees Schedule

**Name:** JAMES R MEADOWS JR FOUNDATION

**EIN:** 62-1545923

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	4,545	0		0

TY 2014 Other Decreases Schedule

**Name:** JAMES R MEADOWS JR FOUNDATION

**EIN:** 62-1545923

Description	Amount
NONDEDUCTIBLE PARTNERSHIP EXPENSES	32

**TY 2014 Other Expenses Schedule****Name:** JAMES R MEADOWS JR FOUNDATION**EIN:** 62-1545923

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
AGENCY FEES	147,772	147,772		0
FOREIGN TAX PAID - TRUXTON	1,844	1,844		0
PARTNERSHIP K-1 DEDUCTIONS	102,703	102,703		0
PARTNERSHIP K-1 CONTRIBUTIONS	1	0		1
FOREIGN TAX PAID - PARTNERSHIP K-1S	1,760	1,760		0

**TY 2014 Other Income Schedule****Name:** JAMES R MEADOWS JR FOUNDATION**EIN:** 62-1545923

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
PARTNERSHIP K-1 INCOME	6,591	6,591	6,591
PARTNERSHIP K-1 INCOME	41,608	41,608	41,608
PARTNERSHIP K-1 INCOME	904	904	904



**TY 2014 Other Increases Schedule****Name:** JAMES R MEADOWS JR FOUNDATION**EIN:** 62-1545923

Description	Amount
NONDIVIDEND DISTRIBUTIONS NOT TAXABLE	2,826

**TY 2014 Other Professional Fees Schedule**

**Name:** JAMES R MEADOWS JR FOUNDATION

**EIN:** 62-1545923

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
BANK FEES	63	63		0

# TY 2014 Substantial Contributors Schedule

**Name:** JAMES R MEADOWS JR FOUNDATION

**EIN:** 62-1545923

Name	Address
ESTATE OF JAMES R MEADOWS JR	408 HYDE PARK NASHVILLE,TN 37215

**TY 2014 Taxes Schedule****Name:** JAMES R MEADOWS JR FOUNDATION**EIN:** 62-1545923

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL INCOME TAXES	13,000	0		0

<div>Schedule B</div> <div>(Form 990, 990-EZ, or 990-PF)</div> <div>Department of the Treasury Internal Revenue Service</div>	<div>Schedule of Contributors</div> <div>▶ Attach to Form 990, 990-EZ, or 990-PF.</div> <div>▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at <a href="http://www.irs.gov/form990">www.irs.gov/form990</a>.</div>	<div>OMB No 1545-0047</div> <div>2014</div>
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<div>Name of the organization</div> <div>JAMES R MEADOWS JR FOUNDATION</div>	<div>Employer identification number</div> <div>62-1545923</div>
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Organization type (check one)

Filers of:	Section:
Form 990 or 990-EZ	<div><input type="checkbox"/> 501(c)( ) (enter number) organization</div> <div><input type="checkbox"/> 4947(a)(1) nonexempt charitable trust <b>not</b> treated as a private foundation</div> <div><input type="checkbox"/> 527 political organization</div>
Form 990-PF	<div><input checked="" type="checkbox"/> 501(c)(3) exempt private foundation</div> <div><input type="checkbox"/> 4947(a)(1) nonexempt charitable trust treated as a private foundation</div> <div><input type="checkbox"/> 501(c)(3) taxable private foundation</div>

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

General Rule

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

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33<sup>1</sup>/<sub>3</sub>% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** \$5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year. . . . . ▶ \$ \_\_\_\_\_

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

JAMES R MEADOWS JR FOUNDATION

62-1545923

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	ESTATE OF JAMES R MEADOWS JR <hr/> 408 HYDE PARK <hr/> NASHVILLE, TN 37215 <hr/>	\$ 546,557	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>  (Complete Part II for noncash contributions )
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
	<hr/> <hr/> <hr/> <hr/>	\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>  (Complete Part II for noncash contributions )
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
	<hr/> <hr/> <hr/> <hr/>	\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>  (Complete Part II for noncash contributions )
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
	<hr/> <hr/> <hr/> <hr/>	\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>  (Complete Part II for noncash contributions )
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
	<hr/> <hr/> <hr/> <hr/>	\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>  (Complete Part II for noncash contributions )
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
	<hr/> <hr/> <hr/> <hr/>	\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>  (Complete Part II for noncash contributions )
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
	<hr/> <hr/> <hr/> <hr/>	\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>  (Complete Part II for noncash contributions )

<b>Name of organization</b> JAMES R MEADOWS JR FOUNDATION	<b>Employer identification number</b> 62-1545923
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<b>Part II</b> <b>Noncash Property</b> (see instructions) Use duplicate copies of Part II if additional space is needed			
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	_____ \$	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	_____ \$	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	_____ \$	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	_____ \$	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	_____ \$	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	_____ \$	_____

<b>Name of organization</b> JAMES R MEADOWS JR FOUNDATION	<b>Employer identification number</b> 62-1545923
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Part III

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

Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	
_____		_____	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	
_____		_____	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	
_____		_____	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	
_____		_____	