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EXTENDED TO AUGUST 17, 2015

Return of Private Foundation

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

OMB No 1545-0052

2014

Open to Public Inspection

Form 990-PF

Department of the Treasury
Internal Revenue Service

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

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

For calendar year 2014 or tax year beginning

, and ending

Name of foundation THE BLUM FAMILY FOUNDATION		A Employer identification number 62-1871174	
Number and street (or P.O. box number if mail is not delivered to street address) 909 BOWRING PARK		Room/suite	B Telephone number (615) 383-4965
City or town, state or province, country, and ZIP or foreign postal code NASHVILLE, TN 37215-2456		C If exemption application is pending, check here ☐	
G Check all that apply: ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐	
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 2,416,661. (Part I, column (d) must be on cash basis)		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	
J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) _____			
Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)			
	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income
	(d) Disbursements for charitable purposes (cash basis only)		
1 Contributions, gifts, grants, etc., received	29,132.		
2 Check ☐ if the foundation is not required to attach Sch. B			
3 Interest on savings and temporary cash investments	8.	8.	8. STATEMENT 1
4 Dividends and interest from securities	33,404.	33,404.	33,404. STATEMENT 2
5a Gross rents			
b Net rental income or (loss)			
6a Net gain or (loss) from sale of assets not on line 10	290,888.		
b Gross sales price for all assets on line 6a	444,300.		
7 Capital gain net income (from Part IV, line 2)		290,888.	
8 Net short-term capital gain			N/A
9 Income modifications			
10a Gross sales less returns and allowances			
b Less Cost of goods sold			
c Gross profit or (loss)			
11 Other income			
12 Total. Add lines 1 through 11	353,432.	324,300.	33,412.
13 Compensation of officers, directors, trustees, etc	0.	0.	0.
14 Other employee salaries and wages			
15 Pension plans, employee benefits			
16a Legal fees			
b Accounting fees STMT 3	3,120.	3,120.	0.
c Other professional fees STMT 4	36,739.	36,739.	0.
17 Interest			
18 Taxes STMT 5	4,302.		0.
19 Depreciation and depletion			
20 Occupancy			
21 Travel, conferences, and meetings			
22 Printing and publications			
23 Other expenses			
24 Total operating and administrative expenses. Add lines 13 through 23	44,161.	39,859.	0.
25 Contributions, gifts, grants paid	291,119.		291,119.
26 Total expenses and disbursements. Add lines 24 and 25	335,280.	39,859.	0.
27 Subtract line 26 from line 12.			
a Excess of revenue over expenses and disbursements	18,152.		
b Net investment income (if negative, enter -0-)		284,441.	
c Adjusted net income (if negative, enter -0-)			33,412.

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LHA For Paperwork Reduction Act Notice, see instructions.

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		
		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	64,270.	49,740.	49,740.
	2 Savings and temporary cash investments	4,852.	4,853.	4,853.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock			
	c Investments - corporate bonds			
	Liabilities	11 Investments - land, buildings, and equipment basis ▶		
Less: accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other STMT 6		1,427,165.	1,439,958.	2,362,068.
14 Land, buildings, and equipment: basis ▶				
Less: accumulated depreciation ▶				
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		1,496,287.	1,494,551.	2,416,661.
17 Accounts payable and accrued expenses				
18 Grants payable				
Net Assets or Fund Balances	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
23 Total liabilities (add lines 17 through 22)	0.	0.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐			
	24 Unrestricted and complete lines 24 through 26 and lines 30 and 31.			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒			
	27 Capital stock, trust principal, or current funds	1,496,287.	1,494,551.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	0.	0.	
30 Total net assets or fund balances	1,496,287.	1,494,551.		
31 Total liabilities and net assets/fund balances	1,496,287.	1,494,551.		

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	1,496,287.
2 Enter amount from Part I, line 27a	2	18,152.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	1,514,439.
5 Decreases not included in line 2 (itemize) ▶ DECREASE IN FUND BALANCE	5	19,888.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,494,551.

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Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a BERKSHIRE HATHAWAY INC	D	VARIOUS	04/04/14
b BELLE MEADE ASSOC. NT L.P.	P	VARIOUS	12/31/14
c BELLE MEADE ASSOC. NT L.P.	P	VARIOUS	12/31/14
d 111.7342 SHARES BELLE MEADE ASSOC. NT L.P.	P	VARIOUS	12/31/14
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 29,132.		9,252.	19,880.
b 168,477.			168,477.
c -8,309.			-8,309.
d 255,000.		144,160.	110,840.
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			19,880.
b			168,477.
c			-8,309.
d			110,840.
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	290,888.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8	{ }	3	-8,309.

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2013	229,694.	2,462,385.	.093281
2012	222,542.	2,116,200.	.105161
2011	192,459.	2,042,838.	.094212
2010	180,925.	2,026,493.	.089280
2009	137,105.	1,842,147.	.074427

2 Total of line 1, column (d)	2	.456361
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	.091272
4 Enter the net value of noncharitable-use assets for 2014 from Part X, line 5	4	2,399,422.
5 Multiply line 4 by line 3	5	219,000.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	2,844.
7 Add lines 5 and 6	7	221,844.
8 Enter qualifying distributions from Part XII, line 4	8	291,119.

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 instructions)

1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		1	2,844.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		2	0.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).		3	2,844.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
3 Add lines 1 and 2		5	2,844.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-			
6 Credits/Payments:			
a 2014 estimated tax payments and 2013 overpayment credited to 2014	6a 4,004.		
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	4,004.	
8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	34.	
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	1,126.	
11 Enter the amount of line 10 to be: Credited to 2015 estimated tax	11	0.	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
1c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation ☐ \$ 0. (2) On foundation managers. ☐ \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ☐ \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities	2	X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3	X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	X
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? If "Yes," attach the statement required by General Instruction T	5	X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	X
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	7	X
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☐ 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? If "No," attach explanation	8b	X
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)? If "Yes," complete Part XIV	9	X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10	X

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Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
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		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	
Website address ► N/A				
14	The books are in care of ► JOAN B. SHAYNE Telephone no. ► (615) 383-4965			
Located at ► 909 BOWRING PARK, NASHVILLE, TN		ZIP+4 ► 37215-2456		
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year	15	N/A	
16	At any time during calendar year 2014, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	Yes	No
See the instructions for exceptions and filing requirements for FinCEN Form 114, (formerly TD F 90-22.1). If "Yes," enter the name of the foreign country ►				X

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

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

5a. During the year did the foundation pay or incur any amount to:

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☒

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

N/A

☐ Yes ☐ No

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

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

☐ Yes ☒ No

6b

X

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

If "Yes" to 6b, file Form 8870

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

☐ Yes ☒ No

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

N/A

7b

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

1 List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
JOAN B. SHAYNE	TRUSTEE			
NASHVILLE, TN	0.00	0.	0.	0.
JENNIFER L. BLUM	TRUSTEE			
SANTA MONICA, CA	0.00	0.	0.	0.
LAUREN BLUM	TRUSTEE			
NEW YORK, NY	0.00	0.	0.	0.
EMILY BLUM HASLETT	TRUSTEE			
NEW YORK, NY	0.00	0.	0.	0.

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

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

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

0

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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	2,362,068.
b	Average of monthly cash balances	1b	73,893.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	2,435,961.
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	2,435,961.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	36,539.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2,399,422.
6	Minimum investment return. Enter 5% of line 5	6	119,971.

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	119,971.
2a	Tax on investment income for 2014 from Part VI, line 5	2a	2,844.
b	Income tax for 2014. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	2,844.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	117,127.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	117,127.
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	117,127.

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	291,119.
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	291,119.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	2,844.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	288,275.

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

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2013	(c) 2013	(d) 2014
1 Distributable amount for 2014 from Part XI, line 7				117,127.
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2014:				
a From 2009	46,094.			
b From 2010	82,865.			
c From 2011	93,775.			
d From 2012	121,258.			
e From 2013	110,577.			
f Total of lines 3a through e	454,569.			
4 Qualifying distributions for 2014 from Part XII, line 4: ► \$	291,119.			
a Applied to 2013, but not more than line 2a			0.	
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				117,127.
e Remaining amount distributed out of corpus	173,992.			
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	628,561.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2013. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2014. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2015				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)	0.			
8 Excess distributions carryover from 2009 not applied on line 5 or line 7	46,094.			
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a	582,467.			
10 Analysis of line 9:				
a Excess from 2010	82,865.			
b Excess from 2011	93,775.			
c Excess from 2012	121,258.			
d Excess from 2013	110,577.			
e Excess from 2014	173,992.			

N/A

- 4942(i)(3) or 4942(i)(5)

- (4) Gross investment income**

[illegible]

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

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
SCHEDULE ATTACHED		EXEMPT	SEE ATTACHED	291,119.
Total			3a	291,119.
b Approved for future payment				
NONE				
Total			3b	0.

Form 990-PF (2014)

Part XVII	Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations
------------------	--

- | | | Yes | No |
|----------|--|--------------|----------|
| 1 | 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? | | |
| a | Transfers from the reporting foundation to a noncharitable exempt organization of: | | |
| | (1) Cash | 1a(1) | X |
| | (2) Other assets | 1a(2) | X |
| b | Other transactions | | |
| | (1) Sales of assets to a noncharitable exempt organization | 1b(1) | X |
| | (2) Purchases of assets from a noncharitable exempt organization | 1b(2) | X |
| | (3) Rental of facilities, equipment, or other assets | 1b(3) | X |
| | (4) Reimbursement arrangements | 1b(4) | X |
| | (5) Loans or loan guarantees | 1b(5) | X |
| | (6) Performance of services or membership or fundraising solicitations | 1b(6) | X |
| c | Sharing of facilities, equipment, mailing lists, other assets, or paid employees | 1c | X |
| 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. | | |

[illegible]

- 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.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

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.

▶ Joan B. Sharpe ▶ 19/28/15 ▶ TRUSTEE

Signature of officer or trustee Date Title

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

Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature <i>Alana Carroll</i>	Date 8/11/15	Check ☐ if self-employed	PTIN P01263172
	Firm's name ▶ DELOITTE TAX LLP			Firm's EIN ▶ 86-1065772	
	Firm's address ▶ 424 CHURCH STREET, SUITE 2400 NASHVILLE, TN 37219			Phone no. (615) 259-1800	

Schedule B
(Form 990, 990-EZ, or 990-PF)Department of the Treasury
Internal Revenue Service**Schedule of Contributors**▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.
▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and
its instructions is at www.irs.gov/form990.

OMB No 1545-0047

2014

Name of the organization

Employer identification number

THE BLUM FAMILY FOUNDATION

62-1871174

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

☐

501(c)() (enter number) organization

☐4947(a)(1) nonexempt charitable trust **not** treated as a private foundation☐

527 political organization

Form 990-PF

☒

501(c)(3) exempt private foundation

☐

4947(a)(1) nonexempt charitable trust treated as a private foundation

☐

501(c)(3) taxable private foundation

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 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 1/3% 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 990-PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2014)

Name of organization

Employer identification number

THE BLUM FAMILY FOUNDATION

62-1871174

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	LAUREN BLUM 35 EAST 85TH STREET NEW YORK, NY 10028	\$ 29,132.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)

Name of organization	Employer identification number
THE BLUM FAMILY FOUNDATION	62-1871174

Part II Noncash Property (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
1	234 SHARES BERKSHIRE HATHAWAY INC COST: 9,253	\$ 29,132.	04/04/14
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	

Name of organization	Employer identification number
THE BLUM FAMILY FOUNDATION	62-1871174

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 info. once) ► \$

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
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

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

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

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
FROM BELLE MEADE ASSOCIATES NT, LP K-1	33,404.	0.	33,404.	33,404.	33,404.
TO PART I, LINE 4	33,404.	0.	33,404.	33,404.	33,404.

FORM 990-PF ACCOUNTING FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	3,120.	3,120.	0.	0.
TO FORM 990-PF, PG 1, LN 16B	3,120.	3,120.	0.	0.

FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FROM BELLE MEADE ASSOCIATES NT, LP K-1 FROM BLUM FOUNDATION - FEES	36,619.	36,619.	0.	0.
	120.	120.	0.	0.
TO FORM 990-PF, PG 1, LN 16C	36,739.	36,739.	0.	0.

FORM 990-PF	TAXES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
IRS TAXES	4,302.	0.	0.	0.
TO FORM 990-PF, PG 1, LN 18	4,302.	0.	0.	0.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	6
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
BELLE MEADE ASSOCIATES NT, LP	COST	1,439,958.	2,362,068.
TOTAL TO FORM 990-PF, PART II, LINE 13		1,439,958.	2,362,068.

FORM 990-PF	PART XV - LINE 1A LIST OF FOUNDATION MANAGERS	STATEMENT	7
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NAME OF MANAGER

JOAN B. SHAYNE
LAUREN BLUM

Transaction Detail For: Blum Family Foundation

Split	Date	Check #	Payee	Category	Tags	Payment	Reconcile	Deposit	Memo/Notes
	1/3/2014	2127	Nashville Opera Guild	Joan		150.00	R		
	1/8/2014	2130	Pardes Institute of Jewish Studies	Joan		7,000.00	R		
	1/8/2014	2131	Family and Children's Service	Joan		500.00	R		
	1/21/2014	2136	National MS Society	Joan		100.00	R		
	1/21/2014	2140	Consumer Reports	Joan		35.00	R		
	2/5/2014	2142	The Fenn School	Joan	In honor of Will Haslett	100.00	R		
	2/6/2014	2141	Special Operations Warriors Foundation	Joan		250.00			
	2/11/2014	2065	Harvard Radcliffe Collegium Museum Foundation	Lauren		250.00	R		
	2/12/2014	2143	J.P. Davis Fund	Joan		200.00	R		
	2/12/2014	2141	Special Operations Warriors Foundation	Joan		250.00	R		
	2/13/2014	2145	Park Center	Joan		200.00	R		
	2/14/2014	2146	Ballet Ball 2014	Joan		200.00	R		
	2/24/2014	2149	Belcourt Theatre	Joan		300.00	R		
	2/26/2014	2148	J Street Education Fund	Joan		5,000.00	R		
	2/28/2014	2147	National Wildlife Federation	Joan		35.00	R		
	3/1/2014	2151	WCC Foundation	Joan		350.00	R		
	3/1/2014	2152	Nashville Symphony Orchestra League	Joan		150.00	R		
	3/1/2014	2155	Fisk University	Joan		500.00	R		
	3/1/2014	2157	Southern Poverty Law Center	Joan		1,000.00	R		
	3/1/2014	2158	Second Harvest Food Bank	Joan		500.00	R		

Blum Family Foundation

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3/1/2014	2156	Vanderbilt University	Joan	40.00	R
3/4/2014	2144	Nashville OIC	Joan	6,000.00	R
3/25/2014	2164	The Swan Ball 2014	Joan	250.00	R
3/26/2014	2166	The Women's Foundation of Middle Tennessee/Joe Kraft	Joan	300.00	R
3/28/2014	2167	The Conservancy	Joan	300.00	R
3/28/2014	2169	Wellesley College	Jenny	400.00	R
3/31/2014	2161	CASA	Joan	250.00	R
3/31/2014	2162	Boys and Girls Clubs of Middle Tennessee	Joan	150.00	R
3/31/2014	2175	Doctor without Borders USA	Joan	300.00	R
4/1/2014	2159	Rabbi Schiffan's Discretionary Fund	Joan	2,500.00	R
4/2/2014	2172	World Wildlife Fund	Joan	75.00	R
4/2/2014	2173	American Heart Association	Joan	75.00	R
4/2/2014	2183	NRDC	Joan	500.00	R
4/2/2014	2184	The Nature Conservancy	Joan	250.00	R
4/7/2014	2185	PENCIL Foundation	Joan	300.00	R
4/8/2014	2188	American Lung Association	Joan	25.00	R
4/8/2014	2193	Tennessee Repertory Theatre	Joan	350.00	R
4/15/2014	2196	Friends of Alta	Lauren	500.00	R
4/24/2014	2197	PPMET	Joan	300.00	R
4/29/2014	2195	Seeds of Peace	Joan	1,000.00	R
5/1/2014	2194	Americans for Peace Now	Joan	300.00	R
5/7/2014	2202	The Lymphoma Foundation	Joan	250.00	R
5/7/2014	2203	Nashville Public Library Foundation	Joan	1,500.00	R
5/7/2014	2204	The Swan Ball - Cheekwood	Joan	750.00	R
5/7/2014	2205	Community Nashville	Joan	500.00	R

Blum Family Foundation

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6/13/2014	2207	Central Synagogue	Lauren		3,530 00	R
6/20/2014	2209	NOAH	Joan		500.00	R
6/26/2014	2214	CASA	Joan		250.00	R
6/26/2014	2215	Youth Villages	Joan		200 00	R
6/26/2014	2213	The Contributor	Joan		200 00	R
6/26/2014	2216	Fifty Forward	Joan		3,000 00	R
6/26/2014	2217	Environmental Defense	Joan		1,500 00	R
6/26/2014	2218	Alive Hospice	Joan		1,000 00	R
6/26/2014	2222	Tennessee State Museum Foundation	Joan		200 00	R
6/26/2014	2219	PENCIL Foundation	Joan		300 00	R
6/26/2014	2223	Akiva School	Joan		150 00	
6/26/2014	2224	Tennessee Justice Center	Joan		250 00	R
6/28/2014	2229	Sexual Assault Center	Joan		150 00	R
6/28/2014	2230	The Abraham Fund Initiatives	Joan		250 00	R
6/30/2014	2225	ACLU Foundation of Tennessee	Joan		25,000 00	R
7/17/2014	2231	Council on Aging	Joan		1,000 00	
7/29/2014	2237	The Westside Children's Center	Jenny		1,000 00	
7/29/2014	2236	Vermont Works for Women	Jenny		500 00	
7/29/2014	2234	Friends of the Israel Defense Fund	Jenny	Adam	250 00	R
8/23/2014	2244	Central Synagogue	Lauren		1,800 00	R
8/23/2014	2245	Central Synagogue	Lauren		1,800 00	R
8/29/2014	2247	Friends of Warner Park	Joan		1,000 00	R
8/29/2014	2249	Elem/Youth in Distress	Joan		250 00	R
8/29/2014	2252	Wellesley Students' Aid Society, Inc	Joan		500 00	R

Blum Family Foundation

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9/9/2014	2258	Park Center	Joan		200 00	R
9/9/2014	2243	826 LA	Jenny		1,000 00	R
9/20/2014	2263	Tennessee Repertory Theatre	Joan		250 00	R
9/20/2014	2261	The Land Trust for Tennessee	Joan		350 00	R
9/20/2014	2262	Consumer Reports Foundation	Joan		35 00	R
9/29/2014	2274	Cobscok Community Learning Center	Emily		0,000 00	R
10/1/2014	2267	Nashville Public Library Foundation	Joan		500 00	R
10/8/2014	2273	Belcourt	Joan		200 00	R
10/8/2014	2277	Community Foundation of Middle Tennessee/Joe Kraft	Joan		250 00	R
10/8/2014	2278	American Jewish World Service	Joan		500 00	R
10/8/2014	2270	ACLU Foundation of Tennessee	Joan		2,500 00	R
10/26/2014	2281	Wellesley College	Jenny		2,500 00	R
11/1/2014	2276	Human Rights Watch	Jenny		1,000 00	R
11/5/2014	2283	Friends of Alta	Lauren		750 00	R
11/5/2014	2284	Lincoln Center Theater	Lauren		1,094 00	R
11/5/2014	2279	Homework Hotline, Inc.	Joan		500 00	R
11/5/2014	2282	Family and Children's Service	Joan		500 00	R
11/5/2014	2286	Legal Aid Society	Joan		2,500 00	R
11/5/2014	2287	Doctors Without Borders	Joan		250 00	R
11/5/2014	2285	Southern Poverty Law Center	Joan		500 00	R
11/21/2014	2288	Doctors Without Borders	Joan		250 00	

Blum Family Foundation

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12/6/2014	2316	Vermont Works for Women	Jenny	250 00	R
12/6/2014	2312	Nichols School	Jenny	250 00	R
12/6/2014	2317	Venice Family Clinic	Jenny	250 00	R
12/7/2014	2320	Wellesley Centers for Women	Joan	500 00	R
12/7/2014	2318	Humanities Tennessee	Joan	250 00	R
12/7/2014	2322	U S. Fund for UNICEF	Joan	500.00	R
12/7/2014	2321	Second Harvest Food Bank	Joan	750 00	R
12/7/2014	2325	Jewish Family Service	Joan	500.00	R
12/7/2014	2326	Room In the Inn	Joan	2,000 00	R
12/7/2014	2324	The Nashville Food Project	Joan	300.00	R
12/7/2014		Abe's Garden	Joan	1,000 00	R
12/8/2014	2329	NCJW Celebration 34	Joan	350 00	R
12/8/2014	2331	MHRC Support Fund	Joan	250 00	R
12/8/2014	2332	Tennessee Justice Center	Joan	250 00	R
12/8/2014	2330	Special Operations Warrior Foundation	Joan	250 00	R
12/8/2014	2333	The Doe Fund	Joan	250.00	R
12/8/2014	2338	Special Olympics Tennessee	Joan	50 00	R
12/17/2014	2340	92nd Street Y	Lauren	1,000 00	R
12/17/2014	2341	Central Park Conservancy	Lauren	250.00	R
12/17/2014	2343	Harvard College Fund	Lauren	1,500 00	R
12/17/2014	2342	HRCM	Lauren	250 00	
12/17/2014	2339	The Hewitt School	Lauren	4,000 00	R
12/17/2014	2342	The Doe Fund	Lauren	500 00	R
12/17/2014	2347	Learning Leaders	Lauren	10,000 00	R
12/25/2014	2349	Ted&Liz Schulman NICU Rocker Fun	Jenny	500.00	R
12/25/2014	2350	Echo Horizon School	Jenny	500.00	R
12/30/2014	2350	The Wall Street Synagogue	Joan	100.00	R
12/30/2014	2354	Gilda's Club	Joan	250 00	R

Blum Family Foundation

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12/30/2014	2358	Americans for Peace Now	Joan	300 00	R
12/30/2014	2359	West End Synagogue	Joan	250 00	
12/30/2014	2360	The Temple Congregation Ohabai Sholom	Joan	8,000 00	R
12/30/2014	2362	Environmental Defense	Joan	200 00	R
12/30/2014	2357	U S Fund for UNICEF	Joan	200 00	R
12/30/2014	2364	Westport Warm up Fund	Joan	50 00	R
12/30/2014	2365	Urban Housing Solutions, Inc	Joan	250 00	R
12/30/2014	2353	Vanderbilt University Medical Center	Joan	12,500 00	R
8/29/2014	2253	PPMET	Joan	500.00	R
12/7/2014	2319	Nashville Symphony	Joan	2,500 00	R
12/7/2014	2323	University School of Nashville	Joan	7,500.00	R
8/29/2014	2254	Cheekwood	Joan	300 00	R
3/1/2014	2150	The Crown Affair 2014	Joan	2,000 00	R
12/8/2014	2327	Gordon Jewish Community Center	Joan	400 00	R
8/29/2014	2246	Vanderbilt University	Joan	300 00	R
12/17/2014	2346	Dartmouth Alumni Fund	Lauren	2,500 00	R
1/21/2014	2139	Safe Haven Family Shelter	Joan	250 00	R
1/2/2014	2123	The Land Trust for Tennessee	Joan	15,000 00	R
12/17/2014	2336	The Schoolhouse	Joan	12,000 00	R
5/7/2014	2201	Harvard College	Jenny	1,500 00	R
9/9/2014	2255	Wilshire Boulevard Temple	Jenny	3,050 00	R

the
Blum-
Cotsen
Family

Albert and
Bernard Werthan
Chair
Amuse-Bouche
Annual gift
Annual gift
Annual
membership
Benefactor
Big Night Out -
2014
Blair School of
Music
C William Merten
75-(600180)
Dancing for Safe
Haven
Educational
Garden Program
Farm project
for Adam Cotsen
For Blum/Cotsen
Family

Blum Family Foundation

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4/15/2014	2186	City Year	Jenny	1,500.00	R	For Jennifer Blum and Family
9/8/2014	2259	Gordon JCC	Joan	400.00	R	For NJFF
5/9/2014	2200	Congregation Micah	Joan	150.00	R	Founders
4/23/2014	2163	350 org	Emily	5,000.00	R	from Emily and Tom Haslett
12/17/2014		The Field Center	Joan	500.00	R	from Joan Blum
12/30/2014	2352	Learning Leaders	Joan	10,000.00	R	Shayne
12/30/2014	2361	Congregation Sherith Israel	Joan	250.00	R	From Joan Shayne
10/26/2014	2280	Windward School	Jenny	5,000.00	R	From the Cotsen Family
12/6/2014	2300	The Dalton School	Lauren	500.00	R	From Lauren Blum
12/6/2014	2311	The Dalton School	Jenny	250.00	R	From Lauren Blum
5/7/2014	2206	Second Harvest Food Bank	Joan	500.00	R	Generous Helpings
1/15/2014	2134	Dalton School	Jenny	500.00	R	Gift from Jennifer Blum
12/6/2014	2295	Vermont Works for Women	Lauren	500.00	R	Gift from Lauren Blum
12/6/2014	2296	WNET	Lauren	150.00	R	Gift from Lauren Blum
12/6/2014	2294	Massachusetts Institute of Technology	Lauren	5,000.00		Gift from Lauren Blum
12/6/2014	2301	Lymphoma Foundation	Lauren	250.00	R	Gift from Lauren Blum
12/6/2014	2302	New Israel Fund	Lauren	1,000.00	R	Gift from Lauren Blum
12/6/2014	2304	Metropolitan Opera	Lauren	7,500.00	R	Gift from Lauren Blum
12/6/2014	2305	New York Public	Lauren	250.00	R	Gift from Lauren

Blum Family Foundation

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12/6/2014	2303	Library Summer Science Program	Lauren	250.00	R	Blum Gift from Lauren Blum
12/6/2014	2309	New York Philharmonic	Lauren	7,500.00	R	Gift from Lauren Blum
12/6/2014	2310	New Yorkers for Parks	Lauren	250.00	R	Gift from Lauren Blum
12/6/2014	2306	Radcliffe Institute Fund	Lauren	1,000.00	R	Gift from Lauren Blum
12/6/2014	2307	Technoserve	Lauren	1,000.00	R	Gift from Lauren Blum
12/6/2014	2308	The Maritime Aquarium	Lauren	100.00		Gift from Lauren Blum
12/7/2014	2298	City Harvest	Lauren	250.00	R	Gift from Lauren Blum
12/7/2014	2297	Yale University	Lauren	5,000.00	R	Gift from Lauren Blum
12/7/2014	2299	American Museum of Natural History	Lauren	1,750.00	R	Gift: Lauren Blum
3/27/2014	2165	MHRC Support Fund	Joan	250.00	R	Host Committee
4/8/2014	2192	Women for Women International	Joan	300.00	R	In honor of Sandy Meyer
12/30/2014	2355	ELEM Youth In Distress In Israel	Joan	500.00	R	In honor of Ann Bialkin
4/1/2014	2191	Seeds of Peace	Joan	500.00	R	In honor of Ben Schwartz
8/29/2014	2250	Windward School	Joan Bobby Cotsen	500.00	R	In honor of Bobby and Julia Cotsen
4/4/2014	2176	AJWS	Joan	500.00	R	In honor of Dr Andrea Ruskin
3/1/2014	2153	Nashville Public Education Foundation	Joan	750.00	R	In honor of Dr Jeffrey Eskind
5/7/2014	2201	Creative Alternatives of NYC	Joan	1,000.00	R	In honor of Ellen Kealy
4/2/2014	2190	South Africa Partners	Joan	500.00	R	In honor of Emily and Tom Haslett
8/29/2014	2251	The Conservancy	Joan	500.00	R	In honor of

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Gala				of Hope Stringer	Hope Stringer
12/8/2014	2328	Open Table Nashville	Joan	100.00 R	In honor of Lauren Plummer
12/8/2014	2337	The Akiva School	Joan	1,000 00 R	In honor of Moshe Werthan
3/29/2014	2187	Rabbi's Mackler Discretionary Fund	Joan	100.00 R	In honor of Rabbi Mackler's 10th anniversary
9/3/2014	2240	Climate Ride	Joan	300 00 R	In honor of Tom Haslett
1/3/2014	2126	South Africa Partners	Joan	200 00 R	In honor of Tom Haslett
4/2/2014	2168	Maine Coast Heritage Trust	Joan	100 00 R	In honor of Tom Haslett
4/1/2014	2170	Jewish Family Service	Joan	300.00 R	In honor of Toni Heller
6/20/2014	2210	Elizabeth Hausman Tikkun Olam Fund	Joan	100 00 R	In memory of Ernest Freudenthal
7/17/2014	2232	Room In the Inn	Joan	250 00	In memory of John Selgenthaler
10/1/2014	2268	Hank Brooks Campership Fund	Joan	50 00 R	In memory of Louise Katzman
1/21/2014	2135	The Temple - Caring and Concern Committee	Joan	75 00 R	In memory of Rabbi Randall Falk
6/28/2014	2228	Temple Ohabai Shalom	Joan	50 00	In memory Mimsye May
5/2/2014	2199	Rabbi Schlifan's Discretionary Fund	Joan	2,000 00 R	Israel trip
1/21/2014	2138	The Frist Center for the Visual Arts	Joan	200 00 R	Ladies Committee
12/30/2014	2356	Ballet Ball/2015	Joan	200 00 R	Ladies Committee

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1/3/2014	2128	The Frist Center for the Visual Arts	Joan	500 00 R	Membership Renewal
7/17/2014	2233	The Temple	Joan	300 00	Memorial Book
10/1/2014	2269	PPMET	Joan	100.00 R	PG-13 Players
8/29/2014	2248	Council on Aging	Joan	150 00 R	Sage Awards
3/24/2014	2160	The Temple	Joan	750 00 R	Temple to Table 2014
2/12/2014	2133	Windward School	Jenny	1,500 00 R	The Cotsen Family
9/9/2014	2260	Spring Hill College	Joan	100 00 R	The George E Barrett Endowed Scholarship
9/29/2014	2275	Natural Resources Defense Council	Emily	10,000 00 R	Tom and Emily Haslett
9/29/2014	2276	350 org	Emily	10,000 00 R	Tom and Emily Haslett
1/21/2014	2137	The Temple	Joan	300 00 R	Yahrzeit Fund

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Application for Extension of Time To File an Exempt Organization Return

► File a separate application for each return.

► Information about Form 8868 and its instructions is at www.irs.gov/form8868.

OMB No 1545-1709

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒ **X**
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form).

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.

Electronic filing (e-file) . You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit www.irs.gov/efile and click on *e-file for Charities & Nonprofits*

Part I Automatic 3-Month Extension of Time. Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete

Part I only ☐

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns

Enter filer's identifying number

Type or print File by the due date for filing your return. See instructions.	Name of exempt organization or other filer, see instructions. THE BLUM FAMILY FOUNDATION	Employer identification number (EIN) or 62-1871174
	Number, street, and room or suite no. If a P O box, see instructions. 909 BOWRING PARK	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. NASHVILLE, TN 37215-2456	

Enter the Return code for the return that this application is for (file a separate application for each return)

04

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720 (other than individual)	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

JOAN B. SHAYNE

- The books are in the care of ► **909 BOWRING PARK - NASHVILLE, TN 37215-2456**
Telephone No ► **(615) 383-4965** Fax No ►

- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) _____ If this is for the whole group, check this box ☐ If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until **AUGUST 17, 2015**, to file the exempt organization return for the organization named above. The extension is for the organization's return for
► ☒ calendar year **2014** or
► ☐ tax year beginning _____, and ending _____

- 2** If the tax year entered in line 1 is for less than 12 months, check reason. ☐ Initial return ☐ Final return
☐ Change in accounting period

3a If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	4,004.
b If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$	4,004.
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$	0.

Caution. If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions

- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** and check this box ☒ **X**
- Note.** Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868
- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** (on page 1)

Part II Additional (Not Automatic) 3-Month Extension of Time. Only file the original (no copies needed).

Enter filer's identifying number, see instructions	
Type or print Name of exempt organization or other filer, see instructions THE BLUM FAMILY FOUNDATION	Employer identification number (EIN) or 62-1871174
File by the due date for filing your return. See instructions. Number, street, and room or suite no. If a P.O. box, see instructions 909 BOWRING PARK	Social security number (SSN)
City, town or post office, state, and ZIP code. For a foreign address, see instructions NASHVILLE, TN 37215-2456	

Enter the Return code for the return that this application is for (file a separate application for each return)

0 4

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01		
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720 (other than individual)	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.**JOAN B. SHAYNE**

- The books are in the care of **▶ 909 BOWRING PARK - NASHVILLE, TN 37215-2456**
Telephone No. **▶ (615) 383-4965** Fax No. **▶**
- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) **▶** If this is for the whole group, check this box ☐ If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for

- I request an additional 3-month extension of time until **NOVEMBER 15, 2015.**
- For calendar year **2014**, or other tax year beginning **▶**, and ending **▶**
- If the tax year entered in line 5 is for less than 12 months, check reason ☐ Initial return ☐ Final return
☐ Change in accounting period
- State in detail why you need the extension
ADDITIONAL TIME IS NEEDED TO COMPLETE THE RETURN.

8a If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions	8a	\$	4,004.
b If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868	8b	\$	4,004.
c Balance due. Subtract line 8b from line 8a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions	8c	\$	0.

Signature and Verification must be completed for Part II only.

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature **▶** *Alana Carroll* Title **▶** Senior Manager, Deloitte Tax LLP Date **▶** 8/12/15

Form 8868 (Rev. 1-2014)