Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

▶ Do not enter social security numbers on this form as it may be made public.
▶ Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf.

OMB No 1545-0052

2014

Open to Public Inspection

For calendar year 2014 or tax year beginning , and ending

Name of foundation: THE WOOL FAMILY FOUNDATION

A Employer identification number: 63-1205782

Number and street (or P O box number if mail is not delivered to street address): 3147 THOMAS DRIVE | Room/suite:

B Telephone number (see instructions): 334-265-4898

City or town, state or province, country, and ZIP or foreign postal code: MONTGOMERY AL 36106

C If exemption application is pending, check here ▶ ☐

D 1 Foreign organizations, check here ▶ ☐
2 Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐

E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐

G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change

H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ $ 906,317

J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) (Part I, column (d) must be on cash basis)

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))

	Line	Description	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc , received (attach schedule)	80,000			
	2	Check ▶ ☐ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments				
	4	Dividends and interest from securities	25,692	25,692	25,692	
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10 Stmt 1	7,882			
	b	Gross sales price for all assets on line 6a 590,092				
	7	Capital gain net income (from Part IV, line 2)		2,870		
	8	Net short-term capital gain			0	
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less. Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule) Stmt 2	1,632		1,632	
	12	**Total.** Add lines 1 through 11	115,206	28,562	27,324	
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc.	0			
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule) Stmt 3	1,385			
	c	Other professional fees (attach schedule) Stmt 4	9,259	9,259		
	17	Interest				
	18	Taxes (attach schedule) (see instructions) Stmt 5	513			
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications	20			
	23	Other expenses (att sch)				
	24	**Total operating and administrative expenses.** Add lines 13 through 23	11,177	9,259	0	0
	25	Contributions, gifts, grants paid	44,345			44,345
	26	**Total expenses and disbursements.** Add lines 24 and 25	55,522	9,259	0	44,345
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	59,684			
	b	**Net investment income** (if negative, enter -0-)		19,303		
	c	**Adjusted net income** (if negative, enter -0-)			27,324	

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Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)

			Beginning of year (a) Book Value	End of year (b) Book Value	End of year (c) Fair Market Value
Assets	1	Cash – non-interest-bearing			
	2	Savings and temporary cash investments	47,021	18,944	18,944
	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 (att schedule) ▶ Less allowance for doubtful accounts ▶ 0			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments – U S and state government obligations (attach schedule)			
	b	Investments – corporate stock (attach schedule) See Stmt 6	161,694	167,797	198,582
	c	Investments – corporate bonds (attach schedule)			
	11	Investments – land, buildings, and equipment basis ▶ Less accumulated depreciation (attach sch) ▶			
	12	Investments – mortgage loans			
	13	Investments – other (attach schedule) See Statement 7	510,613	592,271	688,791
	14	Land, buildings, and equipment basis ▶ Less accumulated depreciation (attach sch) ▶			
	15	Other assets (describe ▶)			
	16	**Total assets** (to be completed by all filers – see the instructions. Also, see page 1, item I)	719,328	779,012	906,317
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 ▶ [X] and complete lines 24 through 26 and lines 30 and 31.**			
	24	Unrestricted	719,328	779,012	
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ [ ] and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg., and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	**Total net assets or fund balances** (see instructions)	719,328	779,012	
	31	**Total liabilities and net assets/fund balances** (see instructions)	719,328	779,012	

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	719,328
2	Enter amount from Part I, line 27a	2	59,684
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	779,012
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5) – Part II, column (b), line 30	6	779,012

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	MORGAN STANLEY			
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	2,870			2,870
b				
c				
d				
e				

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

	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a				2,870
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	2,870
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8	3	

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

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

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

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

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2013	329,983	794,458	0.415356
2012	346,370	678,429	0.510547
2011	502,487	599,665	0.837946
2010	671,265	509,071	1.318608
2009	542,549	377,076	1.438832

2 **Total** of line 1, column (d)	2	4.521289
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	0.904258
4 Enter the net value of noncharitable-use assets for 2014 from Part X, line 5	4	907,362
5 Multiply line 4 by line 3	5	820,489
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	193
7 Add lines 5 and 6	7	820,682
8 Enter qualifying distributions from Part XII, line 4	8	710,525

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)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☐ and enter 1% of Part I, line 27b	1	386
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	386
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	0
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-	5	386
6	Credits/Payments.		
a	2014 estimated tax payments and 2013 overpayment credited to 2014 — 6a		
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	
8	Enter any **penalty** for underpayment of estimated tax Check here ☐ if Form 2220 is attached	8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	386
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	
11	Enter the amount of line 10 to be: **Credited to 2015 estimated tax** ▶ Refunded ▶	11	

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)?	1b		X
	If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities			
c	Did the foundation file **Form 1120-POL** for this year?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: **(1)** On the foundation. ▶ $ ______ **(2)** On foundation managers ▶ $ ______			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ ______			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities	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? N/A	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) ▶ AL			
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 Stmt 8	10	X	

Part VII-A Statements Regarding Activities (continued)

			Yes	No
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 ▶ KEN WOOL Telephone no. ▶ 334-265-4898
3147 THOMAS AVENUE
Located at ▶ MONTGOMERY AL ZIP+4 ▶ 36106

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

			Yes	No
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		X
	See the instructions for exceptions and filing requirements for FinCEN Form 114, (formerly TD F 90-22.1) If "Yes," enter the name of the foreign country ▶			

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

				Yes	No
1a	During the year did the foundation (either directly or indirectly)				
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ 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)?	N/A	1b		
	Organizations relying on a current notice regarding disaster assistance check here	▶ ☐			
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?	N/A	1c		
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))				
a	At the end of tax year 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014?	☐ Yes ☒ No			
	If "Yes," list the years ▶ 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)	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. ▶ 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)	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

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		
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		**6b**	X (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?	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 (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
DR. KEN WOOL MONTGOMERY 3147 THOMAS DRIVE AL 36106	DIRECTOR 0.00	0	0	0

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

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

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

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

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

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over $50,000 for professional services ▶		

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1 See Statement 9	44,345
2	
3	
4	

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

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

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes			
a	Average monthly fair market value of securities		1a	867,474
b	Average of monthly cash balances		1b	53,706
c	Fair market value of all other assets (see instructions)		1c	0
d	**Total** (add lines 1a, b, and c)		1d	921,180
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	921,180
4	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions)		4	13,818
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4		5	907,362
6	**Minimum investment return.** Enter 5% of line 5		6	45,368

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	45,368
2a	Tax on investment income for 2014 from Part VI, line 5	2a 386		
b	Income tax for 2014 (This does not include the tax from Part VI)	2b		
c	Add lines 2a and 2b		2c	386
3	Distributable amount before adjustments Subtract line 2c from line 1		3	44,982
4	Recoveries of amounts treated as qualifying distributions		4	
5	Add lines 3 and 4		5	44,982
6	Deduction from distributable amount (see instructions)		6	
7	**Distributable amount** as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1		7	44,982

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	44,345
b	Program-related investments – total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	666,180
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	710,525
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	710,525

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					44,982
2	Undistributed income, if any, as of the end of 2014					
a	Enter amount for 2013 only					
b	Total for prior years 20____, 20____, 20____					
3	Excess distributions carryover, if any, to 2014					
a	From 2009					
b	From 2010					
c	From 2011	472,439				
d	From 2012	312,706				
e	From 2013	290,767				
f	**Total** of lines 3a through e		1,075,912			
4	Qualifying distributions for 2014 from Part XII, line 4 ▶ $ 710,525					
a	Applied to 2013, but not more than line 2a					
b	Applied to undistributed income of prior years (Election required – see instructions)					
c	Treated as distributions out of corpus (Election required – see instructions)					
d	Applied to 2014 distributable amount					44,982
e	Remaining amount distributed out of corpus		665,543			
5	Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a))					
6	**Enter the net total of each column as indicated below:**					
a	Corpus Add lines 3f, 4c, and 4e Subtract line 5		1,741,455			
b	Prior years' undistributed income Subtract line 4b from line 2b					
c	Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed					
d	Subtract line 6c from line 6b. Taxable amount – see instructions					
e	Undistributed income for 2013 Subtract line 4a from line 2a Taxable amount – see instructions					
f	Undistributed income for 2014 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015					0
7	Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required—see instructions)					
8	Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions)					
9	**Excess distributions carryover to 2015.** Subtract lines 7 and 8 from line 6a		1,741,455			
10	Analysis of line 9:					
a	Excess from 2010					
b	Excess from 2011	472,439				
c	Excess from 2012	312,706				
d	Excess from 2013	290,767				
e	Excess from 2014	665,543				

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

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

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

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

Part XV Supplementary Information (Complete this part only if the foundation had $5,000 or more in assets at any time during the year – see instructions.)

1 **Information Regarding Foundation Managers:**

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

N/A

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

N/A

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

KEN WOOL
3147 THOMAS DRIVE MONTGOMERY AL 36106

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

WRITTEN REQUEST

c Any submission deadlines

THERE ARE NO SUBMISSION DEADLINES.

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

See Statement 10

Part XV Supplementary Information (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year See Statement 11				44,345
Total			▶ 3a	44,345
b Approved for future payment N/A				
Total			▶ 3b	

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income (See instructions)
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	25,692	
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	7,882	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a					
b JP ALERIAN DISTRIBUTION			14	1,632	
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)		0		35,206	0

13 **Total.** Add line 12, columns (b), (d), and (e) 13 35,206

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

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions)
N/A	

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

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements
N/A			

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

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

Kenneth J. Wool | 5/14/2015 | DIRECTOR

Signature of officer or trustee KENNETH J. WOOL | Date | Title

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed
LYNNE BOZEMAN	Lynne Bozeman	05/13/15	
Firm's name ▶ Richard, Harris, Ingram and Bozeman PC		PTIN	P00454121
Firm's address ▶ 7029 Halcyon Park Drive Montgomery, AL 36117		Firm's EIN ▶ 63-1019880 / Phone no 334-277-8135	

DAA

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, 990-PF) and its instructions is at www.irs.gov/form990.**

OMB No 1545-0047

2014

Name of the organization	Employer identification number
THE WOOL FAMILY FOUNDATION	63-1205782

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)

Name of organization
THE WOOL FAMILY FOUNDATION

Employer identification number
63-1205782

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	JACK WOOL CHARITABLE LEAD ANNUITY TR 3452 BANKHEAD AVENUE MONTGOMERY AL 36111	$ 80,000	Person [X] 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)

Federal Statements

Statement 1 - Form 990-PF, Part I, Line 6a - Sale of Assets

Description: Whom Sold	Date Acquired	Date Sold	How Received / Sale Price	Cost	Expense	Depreciation	Net Gain / Loss
APPLE INC			Purchase				
	2/04/13	1/28/14	$ 506	$ 448	$	$	$ 58
CISCO SYS INC			Purchase				
	2/04/13	1/03/14	439	420			19
CONOCOPHILLIPS			Purchase				
	8/26/14	12/09/14	10,605	13,197			-2,592
ENSCO PLC CLASS A			Purchase				
	9/11/14	9/26/14	9,801	11,046			-1,245
FAIRHOLME FUND			Purchase				
	12/27/13	1/17/14	2,369	2,305			64
FIRST TRUST SMALL CAP CORE ETF			Purchase				
	1/17/14	8/26/14	20,960	21,002			-42
FORD MOTOR CO NEW			Purchase				
	3/05/14	12/15/14	15,564	16,820			-1,256
FREEPORT-MCMORAN INC			Purchase				
	1/17/14	12/09/14	4,158	6,289			-2,131
GUGGENHEIM S&P 500 PURE GRW			Purchase				
	2/04/13	1/17/14	142	105			37
HARBOR INTERNATIONAL INST			Purchase				
	Various	1/17/14	591	552			39
ISHARES TIPS BOND ETF			Purchase				
	2/04/13	1/17/14	4,331	4,713			-382
KLA TENCOR CORP			Purchase				
	1/28/14	3/18/14	12,852	11,607			1,245
LEXMARK INTL INC			Purchase				
	3/18/14	12/16/14	11,425	12,878			-1,453
MARKET VECTORS JR GOLD MINES			Purchase				
	1/17/14	12/09/14	6,232	8,468			-2,236
MARKET VECTORS OIL SERVICE			Purchase				
	11/10/14	12/12/14	10,056	13,295			-3,239
MERK & CO INC NEW			Purchase				
	1/03/14	3/05/14	16,806	14,835			1,971
NORFOLK SOUTHERN CORP			Purchase				
	5/29/13	1/17/14	799	692			107

Federal Statements

Statement 1 - Form 990-PF, Part I, Line 6a - Sale of Assets (continued)

Description: Whom Sold	Date Acquired	Date Sold	How Received / Sale Price	Cost	Expense	Depreciation	Net Gain / Loss
NUVEEN PREFERED SEC I			Purchase				
	5/23/13	1/17/14	$ 1,451	$ 1,547	$	$	$ -96
OMNICOM GROUP			Purchase				
	4/23/13	1/03/14	14,815	11,810			3,005
PERMANENT PORTFOLIO INC			Purchase				
	Various	12/30/14	6,066	6,427			-361
PHILIP MORRIS INTL INC			Purchase				
	1/17/14	3/05/14	1,545	1,589			-44
PIMCO TOTAL RETURN ETF			Purchase				
	5/14/13	1/17/14	36,480	37,869			-1,389
REPUBLIC SERVICES INC			Purchase				
	3/05/14	8/26/14	13,246	11,548			1,698
SEADRILL LTD			Purchase				
	3/20/14	9/15/14	7,914	8,940			-1,026
SPDR BARCLAYS CAPITAL HIGH			Purchase				
	2/04/13	1/17/14	3,967	3,941			26
TEMPLETON GLOBAL BD FD			Purchase				
	Various	12/31/14	4,893	5,132			-239
THE ADT CORPORATION COM			Purchase				
	3/05/14	8/26/14	14,872	12,520			2,352
THE MOSAIC CO (HLDG CO) NEW			Purchase				
	1/17/14	9/11/14	5,684	6,033			-349
TRANSOCEAN LTD			Purchase				
	Various	11/10/14	13,304	16,868			-3,564
UNITED PARCEL SERVICE INC			Purchase				
	2/04/13	1/17/14	1,387	1,117			270
VANGUARD FTSE EMERGING MARKETS			Purchase				
	12/04/13	1/17/14	9,130	9,372			-242
VANGUARD REIT ETF			Purchase				
	2/04/13	1/17/14	2,467	2,536			-69
VANGUARD SMALL CAP ETF			Purchase				
	2/04/13	1/17/14	222	172			50
VANGUARD TOTAL BOND MARKET			Purchase				
	8/26/14	9/24/14	20,684	20,835			-151

Federal Statements

Statement 1 - Form 990-PF, Part I, Line 6a - Sale of Assets (continued)

Description: Whom Sold	Date Acquired	Date Sold	How Received / Sale Price	Cost	Expense	Depreciation	Net Gain / Loss
WISDOMTREE EMERG MKTS	12/04/13	1/17/14	Purchase $ 19,954	$ 20,209	$	$	$ -255
WISDOMTREE TR EMG MKTS SMCAP	1/17/14	12/09/14	Purchase 3,117	3,196			-79
WISDOMTREE TRUST EMRG MKT	1/17/14	11/18/14	Purchase 15,783	16,824			-1,041
XILINX INC	1/03/14	8/07/14	Purchase 9,998	11,099			-1,101
ISHARES GOLD TRUST	1/17/14	3/20/14	Purchase 17,911	16,818			1,093
APPLE INC	Various	1/28/14	Purchase 7,593	8,473			-880
CISCO SYS INC	9/13/12	1/03/14	Purchase 10,662	9,307			1,355
FREE-PORT MCMORAN INC	Various	12/09/14	Purchase 3,620	4,778			-1,158
HONEYWELL INTERNATIONAL INC	Various	Various	Purchase 13,500	8,351			5,149
ISHARES TIPS BOND ETF	Various	1/17/14	Purchase 5,220	5,607			-387
ITC HOLDINGS	2/02/12	1/17/14	Purchase 771	592			179
MARKET VECTORS JR GOLD MINES	12/04/13	12/09/14	Purchase 6,154	6,954			-800
NORFOLK SOUTHERN CORP	5/29/13	8/07/14	Purchase 13,347	10,223			3,124
PERMANENT PORTFOLIO INC	Various	12/30/14	Purchase 2,979	3,595			-616
PHILIP MORRIS INTL INC	2/04/13	3/05/14	Purchase 9,841	10,552			-711
SPDR BARCLAYS CAPITAL HIGH	8/21/12	1/17/14	Purchase 34,233	33,404			829
T ROWE PRICE GROUP INC	4/24/12	1/17/14	Purchase 500	374			126

Federal Statements

Statement 1 - Form 990-PF, Part I, Line 6a - Sale of Assets (continued)

Description: Whom Sold	Date Acquired	Date Sold	How Received / Sale Price	Cost	Expense	Depreciation	Net Gain / Loss
TEMPLETON GLOBAL BD FD	Various	12/31/14	Purchase $ 4,357	$ 4,653	$	$	$ -296
THE MOSAIC (HLDG CO) NEW	8/19/13	9/11/14	Purchase 5,363	4,950			413
UNITED PARCEL SERVICE INC	Various	3/05/14	Purchase 11,539	8,971			2,568
VANGUARD MID-CAP ETF	7/11/12	1/17/14	Purchase 2,097	1,440			657
VANGUARD REIT ETF	2/02/12	1/17/14	Purchase 1,267	1,184			83
VANGUARD SMALL CAP	7/11/12	1/17/14	Purchase 1,885	1,283			602
WISDOMTREE TR EMG MKTS	Various	12/09/14	Purchase 13,303	14,048			-745
APPLE INC	Various	1/28/14	Purchase 3,544	1,561			1,983
FAIRHOLME FUND	Various	1/17/14	Purchase 13,671	12,101			1,570
GUGGENHEIM S&P MIDCAP	5/20/11	1/17/14	Purchase 4,398	3,150			1,248
GUGGENHEIM S&P 500 PURE GRW	5/20/11	1/17/14	Purchase 6,187	4,121			2,066
HONEYWELL INTERNATIONAL INC	5/05/10	3/05/14	Purchase 1,143	554			589
PERMANENT PORTFOLIO INC	Various	12/30/14	Purchase 15,267	15,605			-338
POWERSHARES ETF TRUST FINL	Various	1/17/14	Purchase 950	859			91
SPDR GOLD TR	5/05/10	1/17/14	Purchase 8,422	8,031			391
TEMPLETON GLOBAL BD FD	Various	12/31/14	Purchase 30,864	31,004			-140
VANGUARD REIT ETF	1/11/11	1/17/14	Purchase 467	379			88

Federal Statements

Statement 1 - Form 990-PF, Part I, Line 6a - Sale of Assets (continued)

Description: Whom Sold	Date Acquired	Date Sold	How Received: Sale Price	Cost	Expense	Depreciation	Net Gain / Loss
VANGUARD SMALL CAP ETF			Purchase				
	1/11/11	1/17/14	$ 1,552	$ 1,032	$	$	$ 520
Total			$ 587,222	$ 582,210	$ 0	$ 0	$ 5,012

Statement 2 - Form 990-PF, Part I, Line 11 - Other Income

Description	Revenue per Books	Net Investment Income	Adjusted Net Income
JP ALERIAN DISTRIBUTION	$ 1,632	$	$ 1,632
Total	$ 1,632	$ 0	$ 1,632

Statement 3 - Form 990-PF, Part I, Line 16b - Accounting Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
ACCOUNTING FEES	$ 1,385	$	$	$
Total	$ 1,385	$ 0	$ 0	$ 0

Statement 4 - Form 990-PF, Part I, Line 16c - Other Professional Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
INVESTMENT MANAGEMENT FEES	$ 9,254	$ 9,254	$	$
	5	5		
Total	$ 9,259	$ 9,259	$ 0	$ 0

Federal Statements

Statement 5 - Form 990-PF, Part I, Line 18 - Taxes

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
FEDERAL INCOME TAX	$ 513	$	$	$
Total	$ 513	$ 0	$ 0	$ 0

Statement 6 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
STOCK	$ 161,694	$ 167,797	Cost	$ 198,582
Total	$ 161,694	$ 167,797		$ 198,582

Statement 7 - Form 990-PF, Part II, Line 13 - Other Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
MUTUAL FUNDS	$ 153,300	$ 171,239	Cost	$ 171,685
EXCHANGE TRADED & CLOSED END FUNDS	357,313	421,032	Cost	517,106
Total	$ 510,613	$ 592,271		$ 688,791

Statement 8 - Form 990-PF, Part VII-A, Line 10 - Substantial Contributors

Name	Address	City, State, Zip
JACK WOOL CHARITABLE LEAD ANNUITY	3452 BANKHEAD AVENUE	MONTGOMERY AL 36111

Federal Statements

Statement 9 - Form 990-PF, Part IX-A, Line 1 - Summary of Direct Charitable Activities

Description
Provide donations of cash to organizations providing religious, educational or charitable services - supported approximately 36 organizations during the year. See attached list.

Form 990-PF, Part XV, Line 2b - Application Format and Required Contents

Description
WRITTEN REQUEST

Form 990-PF, Part XV, Line 2c - Submission Deadlines

Description
THERE ARE NO SUBMISSION DEADLINES.

Statement 10 - Form 990-PF, Part XV, Line 2d - Award Restrictions or Limitations

Description
THERE ARE NO STATED LIMITATIONS ON AWARDS. AWARDS ARE DETERMINED BY THE BOARD BASED ON REVIEW OF THE WRITTEN REQUEST.

Federal Statements

Statement 11 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year

Name / Address	Address / Relationship / Status	Purpose	Amount
AGUDATH ISRAEL - ETZ AHAYEM MONTGOMERY AL 36111	3525 CLOVERDALE ROAD	RELIGIOUS	1,000
ALABAMA DANCE THEATRE MONTGOMERY AL 36111	1018 MADISON AVENUE	BENEVOLENT	
ALABAMA FOREST OWNERS ASSOCIATION BIRMINGHAM AL 35236	P.O. BOX 361434	BENEVOLENT	25
ALABAMA RIVERS ALLIANCE BIRMINGHAM AL 35203	2014 6TH AVENUE NORTH	BENEVOLENT	450
AMERICAN JEWISH COMMITTEE LOS ANGELES CA 90035	9911 PICO BLVD	RELIGOUS	250
AMERICAN TREE FARM SYSTEM WASHINGTON DC 20036	2000 M STREET, NW STE 550	BENEVOLENT	100
ANTI DEFAMATION LEAGUE BOCA RATON FL 33487	621 NW 53RD STREET STE 45	BENEVOLENT	100
BIRTHRIGHT ISRAEL FOUNDATION NEW YORK NY 10016	NEW YORK	EDUCATIONAL	500
CAMARA TRANSFORMING EDUCATION SAN JOSE CA 95112	1020 COMMERCIAL STREET	EDUCATIONAL	
CANCER WELLNESS CENTER NORTH TONAWANDA NY 14120	84 SWEENEY STREET	HEALTH	1,700
CAPRI THEATRE MONTGOMERY AL 36106	1045 E FAIRVIEW AVENUE	EDUCATIONAL	200
CHILDRENS HOSPICE OF ALABAMA BIRMINGHAM AL 35233	1600 7TH AVENUE S	BENEVOLENT	2,000
CHILDRENS HOSPICE OF BIRMINGHAM BIRMINGHAM AL 35233	1600 7TH AVENUE SOUTH	BENEVOLENT	
DESIGNING DREAMS CUMMING GA 30041	5325 LAKE POINTE CENTER	BENEVOLENT	
DISABLED VETERANS NATIONAL FOUNDATI WASHINGTON DC 20036	1020 19TH STREET NW	BENEVOLENT	50
DISABLED AMERICAN VETS COLD SPRING KY 41076	3725 ALEXANDRIA PIKE	BENEVOLENT	
DR THOMAS J WOOL ENDOWMENT MONTGOMERY AL 36106	3147 THOMAS AVENUE	BENEVOLENT	700

Statement 11 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year (continued)

Name / Address	Address / Relationship	Status	Purpose	Amount
FLAME SAN FRANCISCO CA 94159	P.O. BOX 590359		RELIGOUS	100
FORSYTH COUNTY HUMANE SOCIETY CUMMING GA 30028	P.O. BOX 337		BENEVOLENT	615
FORSYTH COUNTY UNITED WAY CUMMING GA 30028	P.O. BOX 1350		BENEVOLENT	
GEORGIA MOUNTAIN FOOD BANK GAINESVILLE GA 30507	1642 CALVARY INDUSTRIAL D		BENEVOLENT	500
GEORGIA TECH ALUMNI ASSOCIATION ATLANTA GA 30313	190 NORTH AVENUE NW		EDUCATIONAL	250
GESHER L'TORAH ALPHARETTA GA 30022	4320 KIMBALL BRIDGE ROAD		RELIGIOUS	2,735
HEALTHY PAWS FOR A CAUSE CUMMING GA 30040	332 DAHLONEGA STREET		BENEVOLENT	1,065
HIGH MOUNTAIN HAY FEVER FESTIVAL WESTCLIFFE CO 81252	P.O. BOX 1199		BENEVOLENT	
HILLEL WASHINGTON DC 20001-3724	800 EIGHTH STREET NW		RELIGOUS	500
HILLSDALE COLLEGE HILLSDALE MI 49242	33 E, COLLEGE STREET		EDUCATIONAL	50
HOSPICE OF MONTGOMERY MONTGOMERY AL 36117	1111 HOLLOWAY PARK		BENEVOLENT	3,000
JEWISH FEDERATION OF CENTRAL ALABAM MONTGOMERY AL 36117	2820 FAIRLANE DRIVE		RELIGIOUS	1,000
JEWISH FEDERATION OF MONTGOMERY MONTGOMERY AL 36116	2820 FAIRLANE DRIVE		RELIGOUS	2,000
THE LUSTGARTEN FOUNDATION BETHPAGE NY 11714	1111 STEWART AVENUE		BENEVOLENT	1,500
MAYO CLINIC JACKSONVILLE BEACH FL 322	4500 SAN PABLO ROAD		HEALTH	2,000
MONTGOMERY HUMANE SOCIETY MONTGOMERY AL 36110	1150 JOHN OVERTON DRIVE		BENEVOLENT	500
MONTGOMERY MUSEUM OF FINE ARTS MONTGOMERY AL 36117	1 MUSEUM DRIVE		BENEVOLENT	100

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Statement 11 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year (continued)

Name / Address	Address / Relationship / Status	Purpose	Amount
NATIONAL MULTIPLE SCLEROSIS SOCIETY ATLANTA GA 30326	950 EAST PACES FERRY ROAD	BENEVOLENT	
PANCREATIC CANCER ACTION MANHATTAN BEACH CA 90266	1500 ROSECRANS AVENUE	HEALTH	1,500
PARALYZED VETERANS OF AMERICA WASHINGTON DC 20006-3517	801 EIGHTEENTH STREET, NW	BENEVOLENT	
PHI BETA KAPPA NATIONAL HONOR SOCIE MANHATTAN BEACH CA 90266	1606 NEW HAMPSHIRE AVE	EDUCATIONAL	50
RAILS TO TRAILS WASHINGTON DC 20037	2121 WARD CT. NW	BENEVOLENT	
SIERR CLUB SARASOTA FL 34231	2815 PROCTOR ROAD	BENEVOLENT	250
ST JUDE CHILDRENS HOSPITAL MEMPHIS TN 38105	262 DANNY THOMAS PLACE	HEALTH	35
STATE COMBINED CAMPAIGN MONTGOMERY AL 36104	8 COMMERCE STREET	BENEVOLENT	
TEMPLE BETH OR MONTGOMERY AL 36106	2246 NARROW LANE ROAD	RELIGIOUS	2,670
TROUT UNLIMITED ISSAQUAH WA 98027	P.O. BOX 2652	BENEVOLENT	150
TROY PUBLIC RADIO TROY AL 36082	WALLACE HALL	BENEVOLENT	2,000
UNITED SERVICE ORGANIZATION WASHINGTON DC 20090-6322	P.O. BOX 96322	BENEVOLENT	100
UNITED STATE HOLOCAUST MEMORIAL WASHINGTON DC 20024	100 RAOUL WALLENBERG PL S	BENEVOLENT	100
UNITED WAY MONTGOMERY AL 36104	532 S. PERRY STREET	BENEVOLENT	11,000
UNIVERSITY OF ALABAMA BIRMINGHAM BIRMINGHAM AL 35233	1530 3RD AVENUE S	EDUCATIONAL	3,000
UNIVERSITY OF COLORADO FOUNDATION BOULDER CO 80301	4740 WALNUT STREET	EDUCATIONAL	
WET MOUNTAIN VALLEY COMMUNITY FOUND WESTCLIFFE CO 81252	P.O. BOX 718	BENEVOLENT	450

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Statement 11 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year (continued)

Name / Address	Address / Relationship	Status	Purpose	Amount
WOUNDED WARRIOR PROJECT TOPEKA KS 66675	P.O. BOX 758517		BENEVOLENT	50
Total				44,345