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Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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

OMB No 1545-0052

2014

Open to Public Inspection

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

Name of foundation
Allen Family Foundation Inc

% STEVE KURTH

Number and street (or P O box number if mail is not delivered to street address)
2400 South Federal Highway
Suite 200 Suite

Room/suite

City or town, state or province, country, and ZIP or foreign postal code
Stuart, FL 34994

A Employer identification number
65-0783002

B Telephone number (see instructions)
(772) 288-6062

C If exemption application is pending, check here ▶ ☐

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

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 ▶ ☐

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)*▶$ 843,341

J Accounting method ☑ Cash ☐ Accrual
☐ Other (specify) ______
(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 ▶ ☐

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)	0			
	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	23,940	23,940		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	16,468			
	b	Gross sales price for all assets on line 6a 164,000				
	7	Capital gain net income (from Part IV, line 2)		16,468		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)				
	12	**Total.** Add lines 1 through 11	40,408	40,408		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	3,000			
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule)	1,250	0	0	0
	c	Other professional fees (attach schedule)				
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	1,224	170		
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)	8,670	8,430		
	24	**Total operating and administrative expenses.** Add lines 13 through 23	14,144	8,600	0	0
	25	Contributions, gifts, grants paid	41,600			41,600
	26	**Total expenses and disbursements.** Add lines 24 and 25	55,744	8,600	0	41,600
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	-15,336			
	b	**Net investment income** (if negative, enter -0-)		31,808		
	c	**Adjusted net income** (if negative, enter -0-)				

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

			Beginning of year (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	2,693	6,767	6,767
	2	Savings and temporary cash investments	29,065	16,467	16,467
	3	Accounts receivable ▶ ___ Less allowance for doubtful accounts ▶ ___			
	4	Pledges receivable ▶ ___ Less allowance for doubtful accounts ▶ ___			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ ___ Less allowance for doubtful accounts ▶ ___			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	617,174	610,362	820,107
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment basis ▶ ___ Less accumulated depreciation (attach schedule) ▶ ___			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment basis ▶ ___ Less accumulated depreciation (attach schedule) ▶ ___			
	15	Other assets (describe ▶ ___)			
	16	**Total assets** (to be completed by all filers—see the instructions Also, see page 1, item I)	648,932	633,596	843,341
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ ___)			
	23	**Total liabilities** (add lines 17 through 22)		0	
Net Assets or Fund Balances		**Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.**			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☑ and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds	648,932	633,596	
	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)	648,932	633,596	
	31	**Total liabilities and net assets/fund balances** (see instructions)	648,932	633,596	

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	648,932
2	Enter amount from Part I, line 27a	2	-15,336
3	Other increases not included in line 2 (itemize) ▶ ___	3	
4	Add lines 1, 2, and 3	4	633,596
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	633,596

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)
1 a	SEACOAST NATIONAL #007			
b	SEACOAST NATIONAL #007			
c	SEACOAST NATIONAL #007			
d	CAPITAL GAIN DIVIDENDS	P		
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	22,297		22,280	17
b	60,133		61,224	-1,091
c	78,184		64,028	14,156
d				3,386
e				

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a				17
b				-1,091
c				14,156
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	16,468
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8	3	

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

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

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

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2013	22,950	801,843	0 028622
2012	37,300	748,515	0 049832
2011	37,350	747,836	0 049944
2010	38,200	722,434	0 052877
2009	31,500	665,125	0 04736

2	**Total** of line 1, column (d).	2	0 228635
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 045727
4	Enter the net value of noncharitable-use assets for 2014 from Part X, line 5.	4	841,547
5	Multiply line 4 by line 3.	5	38,481
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	318
7	Add lines 5 and 6.	7	38,799
8	Enter qualifying distributions from Part XII, line 4.	8	41,600

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ 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	318
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	2	
3	Add lines 1 and 2	3	318
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-	5	318
6	Credits/Payments		
a	2014 estimated tax payments and 2013 overpayment credited to 2014 — 6a — 880		
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	880
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	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	562
11	Enter the amount of line 10 to be **Credited to 2015 estimated tax** ▶ 562 **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		No
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)?	1b		No
	*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		
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		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		No
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col. (c), and Part XV.*	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶FL			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? *If "No," attach explanation*	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)? *If "Yes," complete Part XIV*	9		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses.*	10		No

Part VII-A Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	

Website address ▶NONE

14 The books are in care of ▶STEVE KURTH Telephone no ▶(772) 288-9800

Located at ▶2400 SOUTH FEDERAL HIGHWAY Stuart FL ZIP+4 ▶34994

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 |

		Line	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		No
	See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes", enter the name of the foreign country ▶			

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

	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.	Line	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)?	1b		No
	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?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? ☐ **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)	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ **Yes** ☑ **No**			
b	If "Yes," did it have excess business holdings in 2014 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969, **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2014.)*	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2014?	4b		No

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

5a	During the year did the foundation pay or incur any amount to			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☑ No			
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☑ No			
	(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☑ No			
	(4) Provide a grant to an organization other than a charitable, etc , organization described in section 4945(d)(4)(A)? (see instructions) ☐ Yes ☑ No			
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☑ No			
b	If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53 4945 or in a current notice regarding disaster assistance (see instructions)?	**5b**		
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ 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**		No
	If "Yes" to 6b, file Form 8870.			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☑ No			
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	**7b**		

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

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

(a) Name and address	**(b)** Title, and average hours per week devoted to position	**(c)** Compensation **(If not paid, enter -0-)**	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
R E Allen 2400 South Federal Highway Stuart, FL 34994	President 2 0	0	0	0
Richard S Allen 2400 South Federal Highway Stuart, FL 34994	Director 2 0	0	0	0
Rex Allen 2400 South Federal Highway Stuart, FL 34994	Treasurer 2 0	0	0	0
Karen Allen 2400 South Federal Highway Stuart, FL 34994	Secretary 2 0	3,000	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

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

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

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

(a) Name and address of each person paid more than $50,000	**(b)** Type of service	**(c)** Compensation
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 N/A	
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 NONE	
2	
All other program-related investments See instructions	
3	
Total. Add lines 1 through 3 . . . . ▶	

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities	1a	825,691
b	Average of monthly cash balances	1b	28,671
c	Fair market value of all other assets (see instructions)	1c	0
d	**Total** (add lines 1a, b, and c)	1d	854,362
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	854,362
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	12,815
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	841,547
6	**Minimum investment return.** Enter 5% of line 5	6	42,077

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	42,077
2a	Tax on investment income for 2014 from Part VI, line 5	2a	318		
b	Income tax for 2014 (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	318
3	Distributable amount before adjustments Subtract line 2c from line 1			3	41,759
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	41,759
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	41,759

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	41,600
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	0
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	0
b	Cash distribution test (attach the required schedule)	3b	0
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	41,600
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	318
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	41,282

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				41,759
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only.			4,711	
b Total for prior years 2012 , 2011 , 2010		0		
3 Excess distributions carryover, if any, to 2014				
a From 2009.				
b From 2010.				
c From 2011.				
d From 2012.				
e From 2013.				
f Total of lines 3a through e.				
4 Qualifying distributions for 2014 from Part XII, line 4 ▶ $ 41,600				
a Applied to 2013, but not more than line 2a			4,711	
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.				36,889
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2014 *(If an amount appears in column (d), the same amount must be shown in column (a).)*				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0			
b Prior years' undistributed income Subtract line 4b from line 2b		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d Subtract line 6c from line 6b Taxable amount —see instructions		0		
e Undistributed income for 2013 Subtract line 4a from line 2a Taxable amount—see instructions				
f Undistributed income for 2014 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015				4,870
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	0			
10 Analysis of line 9				
a Excess from 2010. . . .				
b Excess from 2011. . . .				
c Excess from 2012. . . .				
d Excess from 2013. . . .				
e Excess from 2014. . . . 0				

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

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

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

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

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

1 Information Regarding Foundation Managers:

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

NA

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

NA

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 email address of the person to whom applications should be addressed

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

c Any submission deadlines

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* See Additional Data Table				
Total . . . . ▶ **3a**				41,600
b *Approved for future payment*				
Total . . . . ▶ **3b**				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
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	23,940	
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	16,468	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory. .					
11 Other revenue a					
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e). .				40,408	

13 **Total.** Add line 12, columns (b), (d), and (e). 13 40,408

(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)

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)**		**No**
(2) Other assets	**1a(2)**		**No**
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization	**1b(1)**		**No**
(2) Purchases of assets from a noncharitable exempt organization	**1b(2)**		**No**
(3) Rental of facilities, equipment, or other assets	**1b(3)**		**No**
(4) Reimbursement arrangements	**1b(4)**		**No**
(5) Loans or loan guarantees	**1b(5)**		**No**
(6) Performance of services or membership or fundraising solicitations	**1b(6)**		**No**
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees	**1c**		**No**

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

(a) Line No	**(b)** Amount involved	**(c)** Name of noncharitable exempt organization	**(d)** Description of transfers, transactions, and sharing arrangements

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

Sign Here

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

****** | 2015-05-05 | ******

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	Date	Check if self-employed ▶ ☐	PTIN
Donald Butler				P00541422

Firm's name ▶ MARCUM LLP

Firm's EIN ▶

Firm's address ▶ ONE SE THIRD AVENUE SUITE 1100 MIAMI, FL 33131

Phone no (772) 288-9800

Form 990PF Part XV Line 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*				
500 Year Forest Fund 1133 Old Abert Road Lynchburg, VA 24503	none	PC	Charitable Purposes	300
Alzheimers Assoc PO Box 96011 Washington, DC 20090	none	PC	Charitable Purposes	200
American Cancer Society PO Box 13600 Tampa, FL 33681	none	PC	Charitable Purposes	200
American Diabetis Assoc PO Box 1834 Merrifield, VA 22116	none	PC	Charitable Purposes	200
American Heart Assoc PO Box 78851 Phoenix, AZ 85062	none	PC	Charitable Purposes	200
American Legion Dept Ohio 60 Big Run Road Delaware, OH 43015	none	PC	Charitable Purposes	200
AOPA Foundation 421 Aviation Way Frederick, MD 21701	none	PC	Charitable Purposes	150
Arthritis Foundation PO Box 96280 Bradenton, FL 34205	none	PC	Charitable Purposes	200
Boys & Girls Club Of Martin PO Box 910 Hobe Sound, FL 33475	none	PC	Charitable Purposes	200
Boys Town PO Box 6000 Boys Town, NE 68010	none	PC	Charitable Purposes	200
Bread Of Life Kitchen 2555 NE Savanna Rd Jensen Beach, FL 34957	none	PC	Charitable Purposes	300
Care PO Box 1870 Merrifiefd, VA 22116	none	PC	Charitable Purposes	200
Council On Aging 900 SE Salerno Stuart, FL 34997	none	PC	Charitable Purposes	500
Cystic Fibrosis Foundation PO Box 52074 Phoenix, AZ 85072	none	PC	Charitable Purposes	200
Discovery Riders PO Box 217 Bellefontaine, OH 43311	none	PC	Charitable Purposes	200
Total . . . . ▶ **3a**				41,600

Form 990PF Part XV Line 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*				
Easter Seals PO Box 1482 Hagerstown, MD 21741	none	PC	Charitable Purposes	200
Fla Sherriff Youth Ranch PO Box 2000 Boys Ranch, FL 32064	none	PC	Charitable Purposes	200
Feed the Children PO Box 36 Oklahoma City, OK 73101	none	PC	Charitable Purposes	200
Grand Lodge Charitable Foundation PO Box 629 Worthington, OH 43085	none	PC	Charitable Purposes	200
Guide Eyes For The Blind PO Box 709 Yorktown Heights, NY 10598	none	PC	Charitable Purposes	200
Habitat for Humanity 121 Habitat St Americus, GA 31709	none	PC	Charitable Purposes	200
Hardin City Soup Kitchen 215 E North St Kenton, OH 43326	none	PC	Charitable Purposes	300
Harvest Food & Outreach 2520 Orange Ave Ft Pierce, FL 34947	none	PC	Charitable Purposes	300
Helping Hands Outreach PO Box 151 Kenton, OH 43326	none	PC	Charitable Purposes	300
Hibiscus Children's Center PO Box 305 Jensen Beach, FL 34958	none	PC	Charitable Purposes	150
His Servants Place 2450 E Ocean Blvd Stuart, FL 34995	none	PC	Charitable Purposes	300
House of Hope Martin County 2484 SE Bonita Street Stuart, FL 34997	none	PC	Charitable Purposes	300
Humane Soc Of Treas Coast 4100 SW Leighton Farm Ave Palm City, FL 34990	none	PC	Charitable Purposes	500
Ladle of Love 10100 SE Federal Hwy Hobe Sound, FL 33455	none	PC	Charitable Purposes	300
Little Sisters Of The Poor 964 Main St Pawtucket, RI 02860	none	PC	Charitable Purposes	200
Total . . . . ▶ **3a**				41,600

Form 990PF Part XV Line 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*				
Loaves and Fishes 3127 Tuckaseegee Rd Charlotte, NC 28208	none	PC	Charitable Purposes	300
Luthern Community Services 223 Oakland Square Bellefontaine, OH 43311	none	PC	Charitable Purposes	300
Macular Deg Research 22512 Gateway Center Dr Clarksburg, MD 20871	none	PC	Charitable Purposes	200
Make A Wish Foundation PO Box 97104 Washington, DC 20090	none	PC	Charitable Purposes	200
Manna Kitchen 1500 SE Kanner Hwy Stuart, FL 34995	none	PC	Charitable Purposes	300
Marine Toys for Tots PO Box 4002896 Des Moines, IA 50340	none	PC	Charitable Purposes	200
Martin Memorial Foundation PO Box 9010 Stuart, FL 34995	none	PC	Charitable Purposes	2,000
Mary's Kitchen 623 East Ocean Blvd Stuart, FL 34994	none	PC	Charitable Purposes	300
Meals On Wheels 3337 SE Salerno Rd Stuart, FL 34996	none	PC	Charitable Purposes	500
Memorial Sloan Kettering PO Box 2028 Hagerstown, MD 21741	none	PC	Charitable Purposes	200
Military Order of Purple Heart Box 96188 Washington, DC 20077	none	PC	Charitable Purposes	200
Molly's House 430 SE Ocean Blvd Stuart, FL 34994	none	PC	Charitable Purposes	300
Muscular Dystrophy Assoc PO Box 78960 Phoenix, AZ 85062	none	PC	Charitable Purposes	200
Nat'l Children's Cancer Soc PO Box 8966 Topeka, KS 66608	none	PC	Charitable Purposes	200
Nat'l MS Society PO Box 9807 Fort Lauderdale, FL 33310	none	PC	Charitable Purposes	200
Total . . . . ▶ **3a**				41,600

Form 990PF Part XV Line 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*				
Neighborhood Center 115 E Walnut St Kenton, OH 43326	none	PC	Charitable Purposes	300
New Horizons of Treasure Coast 4500 W Midway Rd Ft Pierce, FL 34981	none	PC	Charitable Purposes	300
Operation Smile 3641 Faculty Blvd Virginia Beach, VA 23453	none	PC	Charitable Purposes	500
Our Daily Bread 223 Oakland Square Bellefontaine, OH 43311	none	PC	Charitable Purposes	300
Planned Parenthood 2300 N Florida Mango Rd West Palm Beach, FL 33409	none	PC	Charitable Purposes	400
Redeemer Soup Kitchen 2450 SE Ocean Blvd Stuart, FL 34996	none	PC	Charitable Purposes	300
Salvation Army PO Box 2475 Stuart, FL 34995	none	PC	Charitable Purposes	500
Shirley May Breast Cancer PO Box 3265 Margate, NJ 08402	none	PC	Charitable Purposes	300
Special Olympics PO Box 120128 Clermont, FL 34712	none	PC	Charitable Purposes	200
St Judes Children Research PO Box 50 Memphis, TN 38101	none	PC	Charitable Purposes	200
The Carpenters Kitchen 1200 E 10th Street Stuart, FL 34996	none	PC	Charitable Purposes	300
The Safe Space 632 SE Monterey Rd Palm City, FL 34990	none	PC	Charitable Purposes	300
The Smile Train PO Box 96231 Washington, DC 20090	none	PC	Charitable Purposes	500
Treasure Coast Food Bank 3051 Industrial 25th St Ft Pierce, FL 34950	none	PC	Charitable Purposes	300
Treasure Coast Hospice 1201 SE Indian St Stuart, FL 34997	none	PC	Charitable Purposes	300
Total . . . . ▶ **3a**				41,600

Form 990PF Part XV Line 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*				
Treasure Coast Wildlife Center 8626 SW Citrus Blvd Palm City, FL 34990	none	PC	Charitable Purposes	200
USO World Hdq PO Box 96860 Washington, DC 20077	none	PC	Charitable Purposes	200
Veterans of Foreign Wars 246 SE Veterans Ave Stuart, FL 34994	none	PC	Charitable Purposes	200
Women in Philantrophy 2135 SE Ocean Blvd Stuart, FL 34996	none	PC	Charitable Purposes	1,000
Visiting Nurse Assoc 2400 SE Monterey Blvd Stuart, FL 34996	none	PC	Charitable Purposes	200
YMCA of Treasure Coast 1700 SE Monterey rd Stuart, FL 34996	none	PC	Charitable Purposes	300
AARP Foundation PO Box 93207 Long Beach, CA 90809	NONE	PC	Charitable Purposes	100
Doctors without Borders PO Box 5023 Hagerstown, MD 21741	NONE	PC	Charitable Purposes	200
Elliott Museum 825 NE Ocean Blvd Stuart, FL 34996	NONE	PC	Charitable Purposes	300
Hospice Martin County 9065 SE Bridge Rd Hobe Sound, FL 33455	NONE	PC	Charitable Purposes	200
Neighborhod Opportunity Center 402 Chesney St Kenton, OH 43326	NONE	PC	Charitable Purposes	300
RE & JSA Foundation PO Box 1379 Stuart, FL 34995	Affilated	PF	Charitable Purposes - Scholarship	20,500
Total . . . . ▶ **3a**				41,600

efile GRAPHIC print - DO NOT PROCESS	As Filed Data -	DLN: 93491138008065

Form **8949**

Department of the Treasury
Internal Revenue Service

Sales and Other Dispositions of Capital Assets

▶ Information about Form 8949 and its separate instructions is at *www.irs.gov/form8949.*
▶ File with your Schedule D to list your transactions for lines 1b, 2, 3, 8b, 9, and 10 of Schedule D.

OMB No 1545-0123

2014

Attachment Sequence No **12A**

Name(s) shown on return	Social security number or taxpayer identification number
	65-0783002

Before you check Box A, B, or C below, check whether you received any Form(s) 1099-B or substitute statement(s) from your broker. A substitute statement will have the same information as Form 1099-B. Either may show your basis (usually your cost) even if your broker did not report it to the IRS. Brokers must report basis to the IRS for most stock you bought in 2011 or later (and for certain debt instruments you bought in 2014 or later).

Part I **Short-Term.** Transactions involving capital assets you held 1 year or less are short term. For long-term transactions, see page 2.
Note. You may aggregate all short-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which NO adjustments or codes are required. Enter the total directly on Schedule D, line 1a; you are not required to report these transactions on Form 8949 (see instructions).

You *must* check Box A, B, *or* C below. Check only one box. If more than one box applies for your short-term transactions, complete a separate Form 8949, page 1, for each applicable box If you have more short-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need

☑ **(A)** Short-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see **Note** above)
☐ **(B)** Short-term transactions reported on Form(s) 1099-B showing basis was **not** reported to the IRS
☐ **(C)** Short-term transactions not reported to you on Form 1099-B

1 (a) Description of property (Example 100 sh XYZ Co)	(b) Date acquired (Mo , day, yr)	(c) Date sold or disposed (Mo , day, yr)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis See the **Note** below and see *Column (e)* in the separate instructions	Adjustment, if any, to gain or loss If you enter an amount in column (g), enter a code in column (f) See the separate instructions		(h) **Gain or (loss).** Subtract column (e) from column (d) and combine the result with column (g)
					(f) Code(s) from instructions	**(g)** Amount of adjustment	
SEACOAST NAT			22,297	(22,280)			17
2 Totals Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts) Enter each total here and include on your Schedule D, **line 1b** (if **Box A** above is checked), **line 2** (if **Box B** above is checked), or **line 3** (if **Box C** above is checked) . . . . ▶			22,297	(22,280)			17

Note. If you checked Box A above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and enter an adjustment in column (g) to correct the basis See *Column* (g) in the separate instructions for how to figure the amount of the adjustment

Name(s) shown on return Name and SSN or taxpayer identification no not required if shown on other side
Allen Family Foundation Inc

Social security number or taxpayer identification number
65-0783002

Before you check Box D, E, or F below, check whether you received any Form(s) 1099-B or substitute statement(s) from your broker. A substitute statement will have the same information as Form 1099-B. Either may show your basis (usually your cost) even if your broker did not report it to the IRS. Brokers must report basis to the IRS for most stock you bought in 2011 or later (and for certain debt instruments you bought in 2014 or later).

Part II **Long-Term.** Transactions involving capital assets you held more than 1 year are long term. For short-term transactions, see page 1.
Note. You may aggregate all long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which NO adjustments or codes are required. Enter the total directly on Schedule D, line 8a; you are not required to report these transactions on Form 8949 (see instructions).

You *must* check Box D, E, *or* F below. Check only one box. If more than one box applies for your long-term transactions, complete a separate Form 8949, page 2, for each applicable box If you have more long-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need

☑ **(D)** Long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see **Note** above)
☐ **(E)** Long-term transactions reported on Form(s) 1099-B showing basis was **not** reported to the IRS
☐ **(F)** Long-term transactions not reported to you on Form 1099-B

1 (a) Description of property (Example 100 sh XYZ Co)	(b) Date acquired (Mo, day, yr)	(c) Date sold or disposed (Mo, day, yr)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis See the **Note** below and see *Column (e)* in the separate instructions	Adjustment, if any, to gain or loss If you enter an amount in column (g), enter a code in column (f) See the separate instructions (f) Code(s) from instructions	(g) Amount of adjustment	(h) **Gain or (loss).** Subtract column (e) from column (d) and combine the result with column (g)
SEACOAST NAT			60,133	(61,224)			-1,091
2 Totals Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts) Enter each total here and include on your Schedule D, **line 8b** (if **Box D** above is checked), **line 9** (if **Box E** above is checked), or **line 10** (if **Box F** above is checked) . . . . ▶			60,133	(61,224)			-1,091

Note. If you checked Box D above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and enter an adjustment in column (g) to correct the basis See *Column* (g) in the separate instructions for how to figure the amount of the adjustment

Part II **Long-Term.** Transactions involving capital assets you held more than 1 year are long term. For short-term transactions, see page 1.
Note. You may aggregate all long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which NO adjustments or codes are required. Enter the total directly on Schedule D, line 8a; you are not required to report these transactions on Form 8949 (see instructions).

You *must* check Box D, E, *or* F below. Check only one box. If more than one box applies for your long-term transactions, complete a separate Form 8949, page 2, for each applicable box If you have more long-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need

☐ **(D)** Long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see **Note** above)
☑ **(E)** Long-term transactions reported on Form(s) 1099-B showing basis was **not** reported to the IRS
☐ **(F)** Long-term transactions not reported to you on Form 1099-B

1 (a) Description of property (Example 100 sh XYZ Co)	(b) Date acquired (Mo, day, yr)	(c) Date sold or disposed (Mo, day, yr)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis See the **Note** below and see *Column (e)* in the separate instructions	Adjustment, if any, to gain or loss If you enter an amount in column (g), enter a code in column (f) See the separate instructions (f) Code(s) from instructions	(g) Amount of adjustment	(h) **Gain or (loss).** Subtract column (e) from column (d) and combine the result with column (g)
SEACOAST NAT			78,184	(64,028)			14,156
2 Totals Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts) Enter each total here and include on your Schedule D, **line 8b** (if **Box D** above is checked), **line 9** (if **Box E** above is checked), or **line 10** (if **Box F** above is checked) . . . . ▶			78,184	(64,028)			14,156

Note. If you checked Box D above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and enter an adjustment in column (g) to correct the basis See *Column* (g) in the separate instructions for how to figure the amount of the adjustment

TY 2014 Accounting Fees Schedule

Name: Allen Family Foundation Inc

EIN: 65-0783002

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	1,250			

TY 2014 All Other Program Related Investments Schedule

Name: Allen Family Foundation Inc

EIN: 65-0783002

Category	Amount
NONE	

TY 2014 Depreciation Schedule

Name: Allen Family Foundation Inc

EIN: 65-0783002

TY 2014 Investments Corporate Stock Schedule

Name: Allen Family Foundation Inc

EIN: 65-0783002

Name of Stock	End of Year Book Value	End of Year Fair Market Value
EQUITY INVESTMENTS	610,362	820,107

TY 2014 Other Expenses Schedule

Name: Allen Family Foundation Inc

EIN: 65-0783002

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
AGENCY FEES	8,430	8,430		
SUPPLIES & MATERIAL	240			

TY 2014 Other Income Schedule

Name: Allen Family Foundation Inc

EIN: 65-0783002

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
FEDERAL TAX REFUND			

TY 2014 Taxes Schedule

Name: Allen Family Foundation Inc

EIN: 65-0783002

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES	170	170		
FEDERAL EXCISE TAX	993			
STATE INCORPORATION TAX	61			

2014 Tax Information Statement

Ref: CAW

Payer's Name and Address.
SEACOAST NATIONAL BANK
815 COLORADO AVE
STUART, FL 34994

Account Number: 610267007
Recipient's Tax ID Number: XX-XXX3002
Payer's Federal ID Number: 59-0193820
Payer's State ID Number:
State: FL

☐ **Corrected** ☐ **2nd TIN notice**

Recipient's Name and Address:
ALLEN FAMILY FOUNDATION INC IMA
C/O ALLEN INVESTMENST
2400 S FEDERAL HIGHWAY, STE 200
STUART, FL 34994

2014 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS is proceeds less commissions and option premiums.
Covered (Box 5 is not checked)

Description of property *(Box 1a)*

Cusip Number	Date Sold or Disposed *(Box 1c)*	Date Acquired *(Box 1b)*	Form 8949 Checkbox	Proceeds *(Box 1d)*	Cost or Other Basis *(Box 1e)*	Code if any *(Box 1f)*	Adjustments *(Box 1g)*	Net Gain or Loss	Federal Income Tax Withheld *(Box 4)*	State Tax Withheld *(Box 16)*
Short Term Sales Reported on 1099-B										
100 0	ISHARES MSCI EMERGING MARKETS ETF									
464287234	02/03/2014	04/23/2013	A	3,753.95	4,212 99		0.00	-459.05	0.00	0 00
25.0	JOHNSON CTLS INC COM									
478366107	11/10/2014	02/07/2014	A	1,224 97	1,169 75		0 00	55 22	0.00	0 00
250.0	POWERSHARES GLOBAL EXCHANGE TRADED FD TR HIGH YIELD USD BD PORTFOLIO									
73936T557	08/21/2014	04/09/2014	A	4,857.42	4,877.47		0.00	-20.05	0.00	0 00
130.0	POWERSHARES GLOBAL EXCHANGE TRADED FD TR HIGH YIELD USD BD PORTFOLIO									
73936T557	11/10/2014	04/09/2014	A	2,496 15	2,536.29		0.00	-40 14	0.00	0 00
25.0	QUALCOMM INC COM									
747525103	04/21/2014	10/25/2013	A	2,021.70	1,697 75		0 00	323.95	0 00	0.00
110 118	ROYCE SPECIAL EQUITY FD									
780905782	07/25/2014	Various	A	2,675.86	2,658 26		0 00	17 60	0 00	0.00
50.0	VANGUARD INDEX FDS VANGUARD SMALL CAP VALUE ETF									
922908611	11/10/2014	07/28/2014	A	5,266 88	5,127 40		0 00	139.48	0 00	0.00
Total Short Term Sales Reported on 1099-B				**22,296 93**	**22,279.91**		**0.00**	**17.01**	**0.00**	**0.00**

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2014 Tax Information Statement

Ref: CAW

Payer's Name and Address:
SEACOAST NATIONAL BANK
815 COLORADO AVE
STUART, FL 34994

Account Number: 610267007
Recipient's Tax ID Number: XX-XXX3002
Payer's Federal ID Number: 59-0193820
Payer's State ID Number:
State: FL
☐ **Corrected** ☐ **2nd TIN notice**

Recipient's Name and Address:
ALLEN FAMILY FOUNDATION INC IMA
C/O ALLEN INVESTMENST
2400 S FEDERAL HIGHWAY, STE 200
STUART, FL 34994

2014 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS is proceeds less commissions and option premiums.
Covered (Box 5 is not checked)

Description of property *(Box 1a)*

Cusip Number	Date Sold or Disposed *(Box 1c)*	Date Acquired *(Box 1b)*	Form 8949 Checkbox	Proceeds *(Box 1d)*	Cost or Other Basis *(Box 1e)*	Code if any *(Box 1f)*	Adjustments *(Box 1g)*	Net Gain or Loss	Federal Income Tax Withheld *(Box 4)*	State Tax Withheld *(Box 16)*
Report on Form 8949, Part I, with Box A checked										
Long Term Sales Reported on 1099-B										
30.0	AUTOMATIC DATA PROCESSING COM									
053015103	09/04/2014	10/11/2012	D	2,511.81	1,756.50		0 00	755 31	0.00	0.00
0.667	CDK GLOBAL INC COM									
12508E101	10/21/2014	10/11/2012	D	17.08	14.81		0.00	2.27	0.00	0.00
56.0	CDK GLOBAL INC COM									
12508E101	10/22/2014	10/11/2012	D	1,574.00	1,243 31		0.00	330.69	0.00	0 00
75 0	COACH INC COM									
189754104	08/21/2014	07/27/2012	D	2,748 69	4,599 74		0.00	-1,851 05	0 00	0 00
25.0	COGNIZANT TECHNOLOGY SOLUTIONS CL A									
192446102	04/21/2014	02/28/2011	D	1,228.98	956.18		0.00	272 80	0 00	0.00
25 0	COGNIZANT TECHNOLOGY SOLUTIONS CL A									
192446102	11/10/2014	02/28/2011	D	1,332.72	956 18		0.00	376.54	0.00	0 00
125.0	DEERE & CO COM									
244199105	07/28/2014	07/05/2011	D	10,693.53	10,618 75		0.00	74 78	0.00	0.00

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TEP227751_12_306 14 of 32

2014 Tax Information Statement

Ref· CAW

Payer's Name and Address:
SEACOAST NATIONAL BANK
815 COLORADO AVE
STUART, FL 34994

Account Number: 610267007
Recipient's Tax ID Number: XX-XXX3002
Payer's Federal ID Number 59-0193820
Payer's State ID Number:
State. FL

☐ **Corrected** ☐ **2nd TIN notice**

Recipient's Name and Address:
ALLEN FAMILY FOUNDATION INC IMA
C/O ALLEN INVESTMENST
2400 S FEDERAL HIGHWAY, STE 200
STUART, FL 34994

2014 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS is proceeds less commissions and option premiums.
Covered (Box 5 is not checked)

Description of property *(Box 1a)*

Cusip Number	Date Sold or Disposed *(Box 1c)*	Date Acquired *(Box 1b)*	Form 8949 Checkbox	Proceeds *(Box 1d)*	Cost or Other Basis *(Box 1e)*	Code if any *(Box 1f)*	Adjustments *(Box 1g)*	Net Gain or Loss	Federal Income Tax Withheld *(Box 4)*	State Tax Withheld *(Box 16)*
45.0	EATON CORP PLC SHS									
G29183103	09/04/2014	11/30/2012	D	3,117 48	2,241.42		0.00	876.06	0.00	0.00
125 0	FAMILY DLR STORES INC COM									
307000109	04/21/2014	02/01/2013	D	7,091.11	7,032.49		0.00	58.62	0 00	0 00
35.0	ISHARES J.P. MORGAN USD EMERGING MARKETS BOND ETF									
464288281	11/10/2014	02/01/2013	D	3,961.46	4,168.85		0.00	-207.39	0 00	0 00
300.0	ISHARES MSCI EMERGING MARKETS ETF									
464287234	02/03/2014	04/01/2011	D	11,261.83	14,825 40		0.00	-3,563 57	0.00	0.00
76.668	JP MORGAN MID CAP VALUE #758									
339128100	11/11/2014	01/16/2013	D	3,000.00	2,207 27		0.00	792.73	0.00	0.00
83 666	ROYCE SPECIAL EQUITY FD									
780905782	07/25/2014	Various	D	2,033.09	1,731 95		0.00	301 14	0.00	0.00
200.0	SOUTHERN CO COM									
842587107	01/02/2014	08/23/2011	D	8,221.86	8,058 00		0 00	163 86	0.00	0.00
25 0	WELLS FARGO CO COM									
949746101	11/10/2014	02/28/2011	D	1,338.97	813.20		0.00	525.77	0 00	0.00
Total Long Term Sales Reported on 1099-B				**60,132 61**	**61,224 05**		**0 00**	**-1,091.44**	**0.00**	**0.00**

Report on Form 8949, Part II, with Box D checked

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TEP22751_12_307 15 of 32

2014 Tax Information Statement

Ref: CAW

Account Number: 610267007
Recipient's Tax ID Number: XX-XXX3002
Payer's Federal ID Number: 59-0193820
Payer's State ID Number:
State: FL

☐ **Corrected** ☐ **2nd TIN notice**

Payer's Name and Address:
SEACOAST NATIONAL BANK
815 COLORADO AVE
STUART, FL 34994

Recipient's Name and Address:
ALLEN FAMILY FOUNDATION INC IMA
C/O ALLEN INVESTMENST
2400 S FEDERAL HIGHWAY, STE 200
STUART, FL 34994

2014 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS is proceeds less commissions and option premiums.
For noncovered securities (Box 5 is checked) shown on this statement, cost basis information is not being reported to the IRS.
Cost or Other Basis amounts shown with a "U" are unknown or unsubstantiated.

Description of property *(Box 1a)*

CUSIP Number	Date Sold or Disposed *(Box 1c)*	Date Acquired *(Box 1b)*	Form 8949 Checkbox	Proceeds *(Box 1d)*	Cost or Other Basis *(Box 1e)*	Code if any *(Box 1f)*	Adjustments *(Box 1g)*	Net Gain or Loss	Federal Income Tax Withheld *(Box 4)*	State Tax Withheld *(Box 16)*
Long Term Sales Reported on 1099-B										
25.0	Amgen Inc									
031162100	11/10/2014	04/19/2004	E	4,074.03	1,509.22		0.00	2,564 81	0.00	0 00
15 0	CHEVRON TEXACO CORP COM									
166764100	08/21/2014	02/22/2010	E	1,913.60	1,112.79		0.00	800 81	0.00	0.00
100.0	COACH INC COM									
189754104	08/21/2014	10/05/2010	E	3,664.93	4,376.81		0.00	-711.88	0.00	0.00
20.0	COLGATE PALMOLIVE CO									
194162103	11/10/2014	08/15/2008	E	1,362.96	784.57		0.00	578.39	0.00	0.00
20000.0	MORGAN STANLEY GLBL SB NT 4.75% DTD 03/30/2004 DUE 04/01/2014									
61748AAE6	04/01/2014	02/17/2010	E	20,000.00	20,317 46		0.00	-317 46	0 00	0.00
15.0	PHILIP MORRIS INTL INC COM									
718172109	11/10/2014	02/12/2008	E	1,319.62	757.21		0.00	562.41	0 00	0 00
15.0	PROCTER & GAMBLE CO COM									
742718109	11/10/2014	03/30/2005	E	1,335.52	800.85		0.00	534.67	0.00	0.00

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2014 Tax Information Statement

Ref: CAW

Account Number:	**610267007**
Recipient's Tax ID Number:	**XX-XXX3002**
Payer's Federal ID Number:	**59-0193820**
Payer's State ID Number:	
State.	**FL**

☐ **Corrected** ☐ **2nd TIN notice**

Recipient's Name and Address:
ALLEN FAMILY FOUNDATION INC IMA
C/O ALLEN INVESTMENST
2400 S FEDERAL HIGHWAY, STE 200
STUART, FL 34994

Payer's Name and Address:
SEACOAST NATIONAL BANK
815 COLORADO AVE
STUART, FL 34994

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Description of property *(Box 1a)*

CUSIP Number	Date Sold or Disposed *(Box 1c)*	Date Acquired *(Box 1b)*	Form 8949 Checkbox	Proceeds *(Box 1d)*	Cost or Other Basis *(Box 1e)*	Code if any *(Box 1f)*	Adjustments *(Box 1g)*	Net Gain or Loss	Federal Income Tax Withheld *(Box 4)*	State Tax Withheld *(Box 16)*
325.0	PUBLIC SVC ENTERPRISE GROUP INC COM									
744573106	02/06/2014	03/10/2004	E	10,841 84	7,525 37		0.00	3,316.47	0.00	0 00
1107 146	ROYCE SPECIAL EQUITY FD									
780905782	07/25/2014	Various	E	26,903.65	21,286.72		0 00	5,616 93	0 00	0.00
15.0	SCHLUMBERGER LTD COM									
806857108	11/10/2014	03/19/2008	E	1,470 66	1,259.65		0.00	211.01	0.00	0.00
151 4	TEMPLETON GLOBAL BOND FUND - AD #616									
880208400	11/11/2014	08/24/2010	E	2,000.00	2,004 54		0.00	-4 54	0.00	0.00
50 0	WALGREEN CO COM									
931422109	04/21/2014	09/21/2007	E	3,297.01	2,292.50		0.00	1,004 51	0.00	0 00
Total Long Term Sales Reported on 1099-B				**78,183.82**	**64,027 69**		**0.00**	**14,156.13**	**0.00**	**0 00**

Report on Form 8949, Part II, with Box E checked

TEP227751_12_310 18 of 32

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