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Form **990-PF**Department of the Treasury
Internal Revenue Service**Return of Private Foundation**

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

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▶ Information about Form 990-PF and its 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 Eugenie & Joseph Jones Family Foundation		A Employer identification number 72-0507534
Number and street (or P.O. box number if mail is not delivered to street address) 835 Union Street		B Telephone number (504) 584-1540
City or town, state or province, country, and ZIP or foreign postal code New Orleans, LA 70112		C If exemption application is pending, check here ☐
G Check all that apply ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ \$ 25,514,399. (Part I, column (d) must be on cash basis.)		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐
J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____		

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check ☒ if the foundation is not required to attach Sch B					
3 Interest on savings and temporary cash investments		7.	7.		Statement 1
4 Dividends and interest from securities		387,809.	387,809.		Statement 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10 Gross sales price for all assets on line 6a		1,102,982.			
7 Capital gain net income (from Part IV, line 2)			1,102,982.		
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)					
11 Other income					
12 Total. Add lines 1 through 11		1,490,798.	1,490,798.		
13 Compensation of officers, directors, trustees, etc		0.	0.		0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees					
c Other professional fees Stmt 3		136,536.	136,536.		0.
17 Interest Stmt 4		92,703.	0.		0.
18 Taxes					
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses Stmt 5		31,504.	5,752.		25,752.
24 Total operating and administrative expenses. Add lines 13 through 23		260,743.	142,288.		25,752.
25 Contributions, gifts, grants paid		997,962.			997,962.
26 Total expenses and disbursements. Add lines 24 and 25		1,258,705.	142,288.		1,023,714.
27 Subtract line 26 from line 12		232,093.			
a Excess of revenue over expenses and disbursements			1,348,510.		
b Net investment income (if negative, enter -0-)					
c Adjusted net income (if negative, enter -0-)				N/A	

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LHA For Paperwork Reduction Act Notice, see instructions.

Form **990-PF** (2014)

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

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	12,169.	10,834.	10,834.
	2 Savings and temporary cash investments	2,347,817.	1,265,863.	1,265,863.
	3 Accounts receivable ▶			
	Less allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U S and state government obligations			
	b Investments - corporate stock Stmt 6	14,575,983.	14,224,992.	19,782,663.
	c Investments - corporate bonds Stmt 7	2,783,200.	4,452,002.	4,455,039.
	Liabilities	11 Investments - land, buildings, and equipment basis ▶		
Less accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other				
14 Land, buildings, and equipment basis ▶ 5,633.				
Less accumulated depreciation Stmt 8 ▶ 5,633.				
15 Other assets (describe ▶ Statement 9)		<682.>	<682.>	0.
16 Total assets (to be completed by all filers - see the instructions Also, see page 1, item I)		19,718,487.	19,953,009.	25,514,399.
17 Accounts payable and accrued expenses				
18 Grants payable				
Net Assets or Fund Balances	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶ Salary Accrual)	5,665.	8,094.	
23 Total liabilities (add lines 17 through 22)	5,665.	8,094.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒			
	27 Capital stock, trust principal, or current funds	0.	0.	
	28 Paid-in or capital surplus, or land, bldg, and equipment fund	3,963,976.	3,963,976.	
	29 Retained earnings, accumulated income, endowment, or other funds	15,748,846.	15,980,939.	
30 Total net assets or fund balances	19,712,822.	19,944,915.		
31 Total liabilities and net assets/fund balances	19,718,487.	19,953,009.		

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	19,712,822.
2 Enter amount from Part I, line 27a	2	232,093.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	19,944,915.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	19,944,915.

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			
b See Attached Statements			
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			
b			
c			
d			
e 6,802,328.		5,699,346.	1,102,982.

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

(i) FMV 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			
b			
c			
d			
e			1,102,982.

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 1,102,982.

3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) { If gain, also enter in Part I, line 8, column (c)
If (loss), enter -0- in Part I, line 8 } 3 N/A

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	1,034,491.	25,317,051.	.040861
2012	921,803.	20,427,545.	.045125
2011	847,499.	18,523,799.	.045752
2010	885,719.	15,721,510.	.056338
2009	1,126,299.	14,429,262.	.078057

2 Total of line 1, column (d)	2	.266133
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	.053227
4 Enter the net value of noncharitable-use assets for 2014 from Part X, line 5	4	26,705,527.
5 Multiply line 4 by line 3	5	1,421,455.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	13,485.
7 Add lines 5 and 6	7	1,434,940.
8 Enter qualifying distributions from Part XII, line 4	8	1,023,714.

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

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary-see instructions)	1	26,970.
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b		
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)	2	0.
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	3	26,970.
3	Add lines 1 and 2	4	0.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	5	26,970.
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		
6	Credits/Payments		
a	2014 estimated tax payments and 2013 overpayment credited to 2014	6a	81,584.
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	81,584.
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	54,614.
11	Enter the amount of line 10 to be Credited to 2015 estimated tax ☐ 26,972. Refunded ☐	11	27,642.

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
1c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ☐ \$ 0. (2) On foundation managers ☐ \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☐ \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		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		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		X
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		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?	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	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☐ LA		
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	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		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13		
14	The books are in care of ► Gulfside, Inc. Telephone no ► (504) 581-2424 Located at ► 835 Union Street, Suite 333, New Orleans, LA ZIP+4 ► 70112			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year ► 15 N/A			
16	At any time during calendar year 2014, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? 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 ►	16	Yes	No X

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

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

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

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

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

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☒

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

N/A

☐ Yes ☐ No

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

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

☐ Yes ☒ No

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

6b

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

X

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

☐ Yes ☒ No

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

N/A

7b

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Statement 10		0.	0.	0.

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

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

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

0

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities	1a	24,940,028.
b	Average of monthly cash balances	1b	2,172,182.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	27,112,210.
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	27,112,210.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	406,683.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	26,705,527.
6	Minimum investment return. Enter 5% of line 5	6	1,335,276.

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	1,335,276.
2a	Tax on investment income for 2014 from Part VI, line 5	2a	26,970.
b	Income tax for 2014 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	26,970.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	1,308,306.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	1,308,306.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	1,308,306.

Part XII**Qualifying Distributions** (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes	1a	1,023,714.
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1b	0.
b	Program-related investments - total from Part IX-B	2	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	3a	
3	Amounts set aside for specific charitable projects that satisfy the	3b	
a	Suitability test (prior IRS approval required)	4	1,023,714.
b	Cash distribution test (attach the required schedule)	5	0.
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	6	1,023,714.
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		
6	Adjusted qualifying distributions. Subtract line 5 from line 4		

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

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2013	(c) 2013	(d) 2014
1 Distributable amount for 2014 from Part XI, line 7				1,308,306.
2 Undistributed income, if any, as of the end of 2014			0.	
a Enter amount for 2013 only			0.	
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2014				
a From 2009	409,064.			
b From 2010	107,634.			
c From 2011				
d From 2012				
e From 2013				
f Total of lines 3a through e	516,698.			
4 Qualifying distributions for 2014 from Part XII, line 4 ▶ \$ 1,023,714.			0.	
a Applied to 2013, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2014 distributable amount				1,023,714.
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).)	284,592.			284,592.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	232,106.			
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b Taxable amount - see instructions		0.		
e Undistributed income for 2013 Subtract line 4a from line 2a Taxable amount - see instr			0.	
f Undistributed income for 2014 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2009 not applied on line 5 or line 7	124,472.			
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a	107,634.			
10 Analysis of line 9				
a Excess from 2010	107,634.			
b Excess from 2011				
c Excess from 2012				
d Excess from 2013				
e Excess from 2014				

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

N/A

1 a 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)

2 a 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

Tax year

(a) 2014

(b) 2013

Prior 3 years

(c) 2012

(d) 2011

(e) Total

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))

None

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

None

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

Susan Jones Gundlach c/o Jones Family Foundation, (504) 584-1545
835 Union Street, Suite 333, New Orleans, LA 70112

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

(See attached application form)

c Any submission deadlines

None

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

None

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

Recipient 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 <i>Paid during the year</i>				
See Attached Schedule	None	Tax Exempt	To fulfill exempt purpose	997,962.
Total			▶ 3a	997,962.
b <i>Approved for future payment</i>				
None				
Total			▶ 3b	0.

Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

- Form
- 990-PF**
- (2014)

EUGENIE.& JOSEPH JONES FAMILY FOUNDATION
FYE.12/31/14

MONTH	FMV - SECURITIES	FMV - CASH	Total
Jan-14	\$25,999,515	\$1,131,769	\$27,131,284
Feb-14	\$26,203,655	\$994,910	\$27,198,564
Mar-14	\$25,602,486	\$1,620,122	\$27,222,608
Apr-14	\$24,883,044	\$2,329,286	\$27,212,330
May-14	\$24,547,678	\$3,238,843	\$27,786,521
Jun-14	\$26,082,168	\$2,421,738	\$28,503,906
Jul-14	\$24,693,899	\$2,669,410	\$27,363,309
Aug-14	\$25,397,034	\$2,837,414	\$28,234,448
Sep-14	\$22,713,492	\$4,015,959	\$26,729,451
Oct-14	\$24,052,011	\$2,229,960	\$26,281,970
Nov-14	\$24,867,651	\$1,300,080	\$26,167,731
Dec-14	\$24,237,699	\$1,276,698	\$25,514,397
	\$299,280,333	\$26,066,188	\$325,346,521
AVG/MO	\$24,940,028	\$2,172,182	\$27,112,211

**Eugenie & Joseph Jones Family Foundation
2014 Charitable Contributions**

Date	Charitable Organization	Amount
1/17/2014	Bishop Wilmer Memorial Fund	\$200
1/17/2014	Greater New Orleans Youth Orchestra	\$1,000
1/17/2014	Hollins College	\$1,500
1/17/2014	Isidore Newman School	\$10,000
1/17/2014	LCRC	\$5,000
1/17/2014	Louise S McGehee School	\$10,000
1/17/2014	Metairie Park Country Day School	\$10,000
1/17/2014	Newcomb Art Gallery	\$2,000
1/17/2014	Second Harvester Food Bank	\$500
1/17/2014	St. Stephen's Episcopal Church	\$1,000
1/17/2014	Trinity Episcopal Church	\$30,000
1/17/2014	Trinity Episcopal School	\$10,000
1/17/2014	United Way	\$5,000
1/17/2014	Washington & Lee University	\$20,000
1/17/2014	Boys Hope/Girls Hope	\$5,000
1/17/2014	Bridge House	\$6,500
1/17/2014	Covenant House	\$25,000
1/17/2014	Friends of City Park	\$25,000
1/17/2014	Jefferson Scholars Foundation	\$50,000
1/17/2014	La Petit Theatre	\$10,000
1/17/2014	Liberty's Kitchen	\$2,500
1/17/2014	Louisiana Children's Museum	\$50,000
1/17/2014	New Orleans Opera Association	\$2,500
1/17/2014	New Orleans Museum of Art	\$35,000
1/17/2014	Poydras Home	\$15,000
1/17/2014	Reconcile New Orleans	\$20,000
1/17/2014	Second Harvester Food Bank	\$5,000
1/17/2014	The Chartwell Center	\$30,000
1/17/2014	The Idea Village	\$10,000
1/17/2014	The National WWII Museum	\$5,000
1/17/2014	NOCCA	\$5,000
1/17/2014	The Trust for Public Land	\$5,000
1/17/2014	Tulane University	\$2,500
1/17/2014	Planned Parenthood	\$65,000
1/17/2014	Friends of City Park	\$65,000
1/17/2014	WYES	\$50,000
3/24/2014	Prospect New Orleans U.S. Biennial	\$25,000
5/20/2014	Teach for America	\$25,000

5/22/2014	Council on Alcohol & Drug Abuse of GNO	\$10,000
5/22/2014	Court Watch NOLA	\$10,000
5/22/2014	Friends of City Park	\$25,000
5/22/2014	Lake Pontchartrain Basin Foundation	\$10,000
5/22/2014	The Lens	\$2,500
5/22/2014	Louisiana Philharmonic Orchestra	\$10,000
5/22/2014	Start the Adventure in Reading	\$10,000
5/22/2014	The Women's Exchange	\$25,000
5/22/2014	Isidore Newman School	\$100,000
7/16/2014	Hancock Hawk Foundation	\$6,000
10/30/2014	Art Council of New Orleans	\$16,500
10/30/2014	Carrollton Boosters	\$50,000
10/30/2014	Greater New Orleans Youth Orchestra	\$2,000
10/30/2014	Jesus Project Ministries	\$12,762
10/30/2014	Market Umbrella/Crescent City Farmers Market	\$10,000
10/30/2014	Tipitina's Foundation	\$13,100
10/30/2014	LSUHSC - Dept of Psychiatry	\$10,000
10/30/2014	VIA Link	\$800
10/30/2014	KID smART	\$2,000
10/30/2014	St Bernard Project	\$22,000
10/30/2014	Trinity Counseling & Training Center	\$5,100
Total Charitable Contributions Made		<u><u>\$997,962</u></u>

Eugenie & Joseph Jones Family Foundation

72-0507534

Page 1 of 2

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	24,000 sh - ION Geophysical	P	11/15/04	02/13/14
b	60,000 sh - ION Geophysical	P	11/16/04	02/13/14
c	19,300 sh - ION Geophysical	P	10/21/11	02/13/14
d	41,900 sh - ION Geophysical	P	04/16/12	02/13/14
e	76,800 sh - ION Geophysical	P	09/06/13	02/13/14
f	\$500,000 - Praxair Inc Bonds	P	06/28/11	03/31/14
g	3,300 sh - Edwards Lifesciences	P	06/06/13	04/14/14
h	\$300,000 - Wells Fargo Bonds	P	07/30/07	04/15/14
i	15,600 sh - Ingredion, Inc	P	05/31/12	04/16/14
j	450 sh - Ingredion, Inc	P	08/30/12	04/16/14
k	1,100 sh - Endurance Specialty	P	12/14/12	05/05/14
l	10,000 sh - Endurance Specialty	P	12/18/12	05/05/14
m	4,000 sh - Endurance Specialty	P	12/26/12	05/05/14
n	7,300 sh - Endurance Specialty	P	12/27/12	05/05/14
o	4,322 sh - Sanchez Energy	P	09/13/13	05/22/14

(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 93,017.		179,178.	<86,161.>
b 232,543.		440,938.	<208,395.>
c 74,801.		125,923.	<51,122.>
d 162,393.		216,567.	<54,174.>
e 297,655.		345,437.	<47,782.>
f 500,000.		542,525.	<42,525.>
g 274,682.		219,062.	55,620.
h 300,000.		282,900.	17,100.
i 1,064,512.		797,221.	267,291.
j 30,707.		24,039.	6,668.
k 55,726.		43,397.	12,329.
l 506,603.		393,918.	112,685.
m 202,641.		156,825.	45,816.
n 369,820.		284,264.	85,556.
o 143,728.		99,412.	44,316.

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
a			<86,161.>
b			<208,395.>
c			<51,122.>
d			<54,174.>
e			<47,782.>
f			<42,525.>
g			55,620.
h			17,100.
i			267,291.
j			6,668.
k			12,329.
l			112,685.
m			45,816.
n			85,556.
o			44,316.

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

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

3

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	9,378 sh - Sanchez Energy	P	09/13/13	05/28/14
b	1,150 sh - VISA	P	01/03/11	07/17/14
c	4,100 sh - Euronet Worldwide	P	07/23/08	08/25/14
d	9,823 sh - Edwards Lifescience	P	06/06/13	09/05/14
e	200 sh - Edwards Lifesciences	P	07/19/13	09/05/12
f	200 sh - Edwards Lifesciences	P	07/19/13	09/05/14
g	200 sh - Edwards Lifesciences	P	07/19/13	09/05/14
h	400 sh - Edwards Lifesciences	P	07/19/13	09/05/14
i	877 sh - Edwards Lifesciences	P	07/19/13	09/05/14
j	1,653 sh - Howard Hughes	P	10/16/13	09/05/14
k	857 sh - Howard Hughes	P	10/16/13	09/09/14
l	1,073 sh - Howard Hughes	P	12/17/13	09/09/14
m				
n				
o				

(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 316,648.		215,707.	100,941.
b 253,653.		81,314.	172,339.
c 212,626.		71,424.	141,202.
d 969,788.		652,075.	317,713.
e 19,745.		13,615.	6,130.
f 19,745.		13,615.	6,130.
g 19,745.		13,615.	6,130.
h 39,490.		27,230.	12,260.
i 86,583.		59,702.	26,881.
j 256,550.		184,805.	71,745.
k 132,736.		95,813.	36,923.
l 166,191.		118,825.	47,366.
m			
n			
o			

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
a			100,941.
b			172,339.
c			141,202.
d			317,713.
e			6,130.
f			6,130.
g			6,130.
h			12,260.
i			26,881.
j			71,745.
k			36,923.
l			47,366.
m			
n			
o			

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	1,102,982.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) If (loss), enter "-0-" in Part I, line 8 }	3	N/A

Form 990-PF Interest on Savings and Temporary Cash Investments Statement 1

Source	(a) Revenue Per Books	(b) Net Investment Income	(c) Adjusted Net Income
JP Morgan Chase checking	7.	7.	
Total to Part I, line 3	7.	7.	

Form 990-PF Dividends and Interest from Securities Statement 2

Source	Gross Amount	Capital Gains Dividends	(a) Revenue Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income
Schwab Institutional	270,856.	0.	270,856.	270,856.	
Schwab Institutional	<4,951.>	0.	<4,951.>	<4,951.>	
Schwab Institutional	133,213.	0.	133,213.	133,213.	
Schwab Institutional	<11,309.>	0.	<11,309.>	<11,309.>	
To Part I, line 4	387,809.	0.	387,809.	387,809.	

Form 990-PF Other Professional Fees Statement 3

Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Investment Counselling Fee	136,536.	136,536.		0.
To Form 990-PF, Pg 1, ln 16c	136,536.	136,536.		0.

Form 990-PF	Taxes			Statement	4
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
Excise Tax	92,703.	0.		0.	
To Form 990-PF, Pg 1, ln 18	92,703.	0.		0.	

Form 990-PF	Other Expenses			Statement	5
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
Computer Supplies	2,613.	0.		2,613.	
Bank Charges / Wire transfer fees	125.	0.		125.	
Salary Expense - payroll master - reported under 72-0145535	23,504.	4,700.		18,804.	
Benefits Expense	5,262.	1,052.		4,210.	
To Form 990-PF, Pg 1, ln 23	31,504.	5,752.		25,752.	

Form 990-PF	Corporate Stock		Statement	6
Description	Book Value		Fair Market Value	
Investments - Stocks	14,224,992.		19,782,663.	
Total to Form 990-PF, Part II, line 10b	14,224,992.		19,782,663.	

Eugenie & Joseph Jones Family Foundation
Balance Sheet - Corporate Stock and Corporate Bonds
January 1 - December 31, 2014

Form 990 - PF
Line 10 (b)

Corporate Stock	Book Value	Fair Market Value
25,650 sh - 3 D Systems Corp	\$397,480	\$843,116
9,100 sh - Apple Inc.	\$480,716	\$1,004,458
20,700 sh - B E Aerospace Inc	\$451,163	\$1,201,014
26,500 sh - Conn's Inc	\$774,476	\$495,285
11,000 sh - DST Systems	\$931,880	\$1,035,650
73,300 sh - Epiq Systems	\$926,925	\$1,251,964
20,531 sh - Euronet Worldwide	\$319,588	\$1,127,152
51,000 sh - Everbank Financial	\$964,088	\$972,060
15,800 sh - Express Scripts	\$864,786	\$1,337,786
54,900 sh - Flowers Foods, Inc.	\$768,332	\$1,053,531
6,417 sh - Howard Hughes Corp	\$715,033	\$836,905
10,350 sh - KLX Inc	\$177,660	\$426,938
37,500 sh - LKQ Corp	\$1,078,531	\$1,054,500
68,200 sh - Luminex	\$459,647	\$1,279,432
26,000 sh - Oasis Petroleum	\$944,330	\$430,040
28,500 sh - Pinnacle Foods	\$962,432	\$1,006,050
25,800 sh - Pool Corp	\$559,092	\$1,636,752
49,200 sh - Sanchez Energy	\$1,179,285	\$457,068
26,400 sh - Sotheby's Holdings Inc	\$827,023	\$1,139,952
4,550 sh - Visa Inc.	\$442,525	\$1,193,010
	<u>\$14,224,992</u>	<u>\$19,782,663</u>

Form 990-PF	Corporate Bonds	Statement	7
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Description	Book Value	Fair Market Value
Investments - Bonds	4,452,002.	4,455,039.
Total to Form 990-PF, Part II, line 10c	4,452,002.	4,455,039.

Form 990-PF	Depreciation of Assets Not Held for Investment	Statement	8
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Description	Cost or Other Basis	Accumulated Depreciation	Book Value
Computer Equipment	3,534.	3,534.	0.
Computer Equipment	2,099.	2,099.	0.
Total To Fm 990-PF, Part II, ln 14	5,633.	5,633.	0.

Form 990-PF	Other Assets	Statement	9
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Description	Beginning of Yr Book Value	End of Year Book Value	Fair Market Value
Other Partnership Investment	<682.>	<682.>	0.
To Form 990-PF, Part II, line 15	<682.>	<682.>	0.

Eugenie & Joseph Jones Family Foundation
Balance Sheet - Corporate Stock and Corporate Bonds
January 1 - December 31, 2014

Form 990 - PF
Line 10 c

Corporate Bonds

	Book Value	Fair Market Value
\$500,000 Goldman Sachs Group Bonds	\$506,105	\$502,570
\$500,000 Verizon Communications Bonds	\$499,750	\$497,918
\$500,000 IBM Corp 5/15/2019 1.875%	\$498,125	\$496,551
\$500,000 LKQ Corp Bonds 4.75%	\$485,015	\$477,500
\$500,000 Northrup Gruman 1.75% Bonds	\$500,217	\$496,214
\$500,000 General Electric Cap 5.75% 8/15/2016	\$534,100	\$532,793
\$500,000 Whitney 5.875% 4/01/2017	\$442,525	\$522,965
\$500,000 Hewlett Packard 4.05% 9/15/2022	\$483,025	\$507,903
\$500,000 PHI Inc 5.25% Bonds	\$503,140	\$420,625
Total	<u>\$4,452,002</u>	<u>\$4,455,039</u>

Form 990-PF

Part VIII - List of Officers, Directors
Trustees and Foundation Managers

Statement 10

Name and Address	Title and Avrg Hrs/Wk	Compen- sation	Employee Ben Plan	Expense Contrib Account
Susan J. Gundlach 835 Union Street, Suite 333 New Orleans, LA 70112	President 5.00	0.	0.	0.
Elaine F. Jones 835 Union Street, Suite 333 New Orleans, LA 70112	Sec / Treas 5.00	0.	0.	0.
Deborah H. Valentine 835 Union Street, Suite 333 New Orleans, LA 70112	Trustee 5.00	0.	0.	0.
Eugenie H. Sloss 835 Union Street, Suite 333 New Orleans, LA 70112	Trustee 5.00	0.	0.	0.
Melissa Steiner 835 Union Street, Suite 333 New Orleans, LA 70112	Trustee 5.00	0.	0.	0.
Susan L. Stall 835 Union Street, Suite 333 New Orleans, LA 70112	Trustee 5.00	0.	0.	0.
Totals included on 990-PF, Page 6, Part VIII		0.	0.	0.

2014 DEPRECIATION AND AMORTIZATION REPORT

Form 990-PF Page 1

990-PF

Asset No	Description	Date Acquired	Method	Life	Line No	Unadjusted Cost Or Basis	Bus % Excl	* Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Current Sec 179	Current Year Deduction
1	Computer Equipment	05/18/98	200DB	5.00	17	3,534.			3,534.	3,534.		0.
2	Computer Equipment	05/10/12	200DB	5.00	17	2,099.			2,099.	2,099.		0.
	* Total 990-PF Pg 1 Depr					5,633.		0.	5,633.	5,633.	0.	0.

Eugenie & Joseph Jones Family Foundation Application Form

The Eugenie & Joseph Jones Family Foundation's primary areas of interest include education, community development, health and human services, and arts and cultural programs. Primary consideration will be given to those organizations whose operations are conducted in the Greater New Orleans area. Grants are made only to non-profit, tax-exempt organizations with 501(c) (3) status. No grants are made to individuals for any purpose.

- - - - - Proposals are accepted and reviewed throughout the year. Decisions regarding grants will be made at regularly scheduled meetings of the trustee. - - - - -

GENERAL INSTRUCTIONS

- Please type and single space all proposals.
- Please answer all of the questions in the order listed.
- Please submit only one copy.
- Please do not send videotapes.
- Please do not include any material other than requested.

Proposals should be sent to:

Mrs. Susan Jones Gundlach – President
Eugenie & Joseph Jones Family Foundation
835 Union Street
New Orleans, LA 70112
(504)584-1545

Eugenie & Joseph Jones Family Foundation Grant Proposal Guidelines

I. Proposal Narrative

a. Background – Describe the work of your agency addressing each of the following topics:

1. Brief description – History and mission
2. Current program, accomplishments and achievements
3. Organizational Structure – Board, Staff and volunteers
4. Organizational Relationship – Providing similar services of other agencies
(explain differences and similarities)

b. Funding Request – Please describe the program for which you seek funding.

1. General Operating Support – Describe how the grant would be used.
2. Specific Project/Program – Describe in detail as follows:
 - Statement of primary purpose and issue that you are seeking to address
 - Names and qualifications of individuals who direct the project
 - Timeline of Project
 - How Project contributes to overall mission of your organization and the benefits to the community
 - Collaboration/Interaction with other groups

c. Evaluation – Please explain how you will measure the effectiveness of your activities.

1. Criteria for successful program
2. Expected achievements by end of funding period
3. Future plans for funding

II. Attachments – Please label all attachments

a. Financial Information – Overall Organization

1. Current and prior year operating budget including expenses and revenue; list sources of revenue received and those pending including in-kind.
2. Annual Financial Statement (most recent, audited if available, if not enclose most recent IRS Form 990)

b. Financial Information – Project/Program

1. Project budget
2. Key staff positions and % of time spent on project
3. Names and amounts requested from other foundations, corporation and other funding sources for this particular proposal
4. Specific uses of requested grant
5. In-kind support

c. Other supporting materials

1. List of Board of Directors and their principal affiliations
2. One-paragraph resume of key organizational staff including key project staff
3. Copy of IRS determination letter indicating 501 (c)(3) and 509 (a) tax exempt status
4. Recent annual report
5. Agency affiliation with federated funds or public agencies

III. Proposal Summary – Attached proposal summary sheet must be completed.

Eugenie & Joseph Jones Family Foundation

Grant Proposal Summary Sheet

Name of Organization		Date:
Address of Organization		Telephone
Names and Titles of Individuals Submitting Request		United Way/ACA/Gov't Support
Amount Requested \$	Total This Project /Program \$	Total Organizational Annual Budget \$
Brief Title (One Sentence)		Dates of Project/Program
Please summarize in a short paragraph the purpose of your agency. Briefly explain why your agency is requesting this grant, what outcome you hope to achieve, and how you will spend the funds if a grant is made.		
Others being solicited for this project	Amount requested	Amount received
Subject focus (Program area)	Population Served	Type of Support Requested (i.e. Operating, Capital, Start-up, etc)
Signature of Board Chairman		Signature of Executive Officer
Print Name		Print Name