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Form 990-PF

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

2014

Open to Public Inspection

Department of the Treasury Internal Revenue Service

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For calendar year 2014, or tax year beginning 04-01-2014, and ending 03-31-2015

Name of foundation THE MARY E BABCOCK FOUNDATION
A Employer identification number 31-1170451
B Telephone number (see instructions) (614) 855-7610
C If exemption application is pending, check here
G Check all that apply Initial return, Final return, Address change, etc.
H Check type of organization Section 501(c)(3) exempt private foundation
I Fair market value of all assets at end of year \$ 2,149,765
J Accounting method Cash

Table with 5 columns: (a) Revenue and expenses per books, (b) Net investment income, (c) Adjusted net income, (d) Disbursements for charitable purposes. Rows include Revenue (1-12) and Operating and Administrative Expenses (13-26), leading to Total expenses and disbursements of 113,765 and Excess of revenue over expenses of 70,643.

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

Part II Balance Sheets		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing	559		
	2 Savings and temporary cash investments	26,544	7,767	7,767
	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)	360,895 <input type="checkbox"/>	290,356	421,033
	c Investments—corporate bonds (attach schedule)	182,023 <input type="checkbox"/>	123,549	122,389
	11 Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	1,181,752 <input type="checkbox"/>	1,399,831	1,598,576
	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)	1,751,773	1,821,503	2,149,765	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶ _____)			
	23 Total liabilities (add lines 17 through 22)	0	0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	1,751,773	1,821,503	
	28 Paid-in or capital surplus, or land, bldg, and equipment fund	0	0	
29 Retained earnings, accumulated income, endowment, or other funds	0	0		
30 Total net assets or fund balances (see instructions)	1,751,773	1,821,503		
31 Total liabilities and net assets/fund balances (see instructions)	1,751,773	1,821,503		

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	1,751,773
2	Enter amount from Part I, line 27a	2	70,643
3	Other increases not included in line 2 (itemize) ▶ _____ <input type="checkbox"/>	3	7,500
4	Add lines 1, 2, and 3	4	1,829,916
5	Decreases not included in line 2 (itemize) ▶ _____ <input type="checkbox"/>	5	8,413
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	1,821,503

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo, day, yr)	(d) Date sold (mo, day, yr)
1a See Additional Data Table			
b			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a See Additional Data Table			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(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	
a See Additional Data Table			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	129,239
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	87,032	1,990,822	0.043717
2012	65,015	1,803,912	0.036041
2011	18,494	1,697,830	0.010893
2010	10,203	1,579,019	0.006462
2009	27,388	1,398,183	0.019588

2 Total of line 1, column (d).	2	0.116701
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	0.023340
4 Enter the net value of noncharitable-use assets for 2014 from Part X, line 5.	4	2,123,623
5 Multiply line 4 by line 3.	5	49,565
6 Enter 1% of net investment income (1% of Part I, line 27b).	6	1,661
7 Add lines 5 and 6.	7	51,226
8 Enter qualifying distributions from Part XII, line 4.	8	97,673

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1	1,661
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	2	0
3	Add lines 1 and 2.	3	1,661
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	0
5	Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-	5	1,661
6	Credits/Payments		
a	2014 estimated tax payments and 2013 overpayment credited to 2014	6a	1,350
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	1,350
8	Enter any penalty for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached	8	4
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	315
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	
11	Enter the amount of line 10 to be Credited to 2015 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	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?		No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)? <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.</i>		No
c Did the foundation file Form 1120-POL for this year?		No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation <input type="checkbox"/> \$ <u>0</u> (2) On foundation managers <input type="checkbox"/> \$ <u>0</u>		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ <u>0</u>		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>		No
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>		No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		No
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>		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?	Yes	
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV.</i>	Yes	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> OH _____		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation.</i>	Yes	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>		No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>		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? Website address N/A	13	Yes	
14	The books are in care of SCOTT E SHILLING Telephone no (614) 855-7610 Located at 6650 WALNUT STREET NEW ALBANY OH ZIP+4 43054			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year 15			
16	At any time during calendar year 2014, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? 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	16	Yes	No

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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
1b	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)? <input type="checkbox"/> Organizations relying on a current notice regarding disaster assistance check here <input type="checkbox"/>	1b		
1c	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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2014.</i>)	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)

<p>5a During the year did the foundation pay or incur any amount to</p> <p>(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(3) Provide a grant to an individual for travel, study, or other similar purposes? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No Organizations relying on a current notice regarding disaster assistance check here. <input type="checkbox"/></p> <p>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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," attach the statement required by Regulations section 53.4945–5(d).</p> <p>6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes" to 6b, file Form 8870.</p> <p>7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p>	5b	No
6b	6b	No
7b	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
See Additional Data Table				

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

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

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

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

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services.	▶	0

Part IX-A Summary of Direct Charitable Activities

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

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

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

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	2,155,962
b	Average of monthly cash balances.	1b	0
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	2,155,962
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	2,155,962
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	32,339
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	2,123,623
6	Minimum investment return. Enter 5% of line 5.	6	106,181

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	106,181
2a	Tax on investment income for 2014 from Part VI, line 5.	2a	1,661
b	Income tax for 2014 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	1,661
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	104,520
4	Recoveries of amounts treated as qualifying distributions.	4	7,500
5	Add lines 3 and 4.	5	112,020
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	112,020

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	97,673
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	97,673
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	1,661
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	96,012

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				112,020
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only.			97,673	
b Total for prior years 20___, 20___, 20___		0		
3 Excess distributions carryover, if any, to 2014				
a From 2009.				
b From 2010.				
c From 2011.				
d From 2012.				
e From 2013.				
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2014 from Part XII, line 4 ▶ \$ <u>97,673</u>				
a Applied to 2013, but not more than line 2a			97,673	
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.				0
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2014 <i>(If an amount appears in column (d), the same amount must be shown in column (a).)</i>	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0			
b Prior years' undistributed income Subtract line 4b from line 2b.		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 2013 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2014 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015.				112,020
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions).	0			
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a.	0			
10 Analysis of line 9				
a Excess from 2010.				
b Excess from 2011.				
c Excess from 2012.				
d Excess from 2013.				
e Excess from 2014.				

Part 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))

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed

SCOTT SHILLING
6650 WALNUT ST
NEW ALBANY, OH 43054
(614) 855-7610

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

BRIEF DESCRIPTION OF CHARITABLE ACTIVITIES FOR WHICH FUNDS ARE REQUESTED

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

JOHNSTOWN, OHIO AREA

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 Additional Data Table				
Total				▶ 3a 97,625
b <i>Approved for future payment</i>				
Total				▶ 3b 0

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

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
48 411 HARBOR CAPITAL APPRECIATION	P	2014-02-10	2014-10-31
526 180 LOOMIS SAYLES BOND FD	P	2014-04-03	2014-10-24
44 VANGUARD SMALL-CAP GROWTH ETF	P	2014-03-06	2014-10-24
26 VANGUARD SMALL-CAP GROWTH ETF	P	2014-03-06	2015-01-22
300 3M COMPANY	P	2006-02-17	2014-10-03
350 ABBVIE	P	2002-02-08	2014-09-18
280 APPLE	P	2008-01-08	2014-10-03
400 CHURCH & DWIGHT	P	2007-09-07	2014-04-03
245 538 DFA REAL ESTATE SEC FD	P	2013-07-26	2015-01-08
200 EMERSON ELECTRIC CO	P	2010-09-27	2014-10-03

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
3,000		2,779	221
8,140		8,140	0
5,265		5,686	-421
3,265		3,360	-95
28,050		14,784	13,266
20,718		9,440	11,278
27,950		6,852	21,098
27,406		8,838	18,568
8,530		7,025	1,505
12,521		10,639	1,882

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
			221
			0
			-421
			-95
			13,266
			11,278
			21,098
			18,568
			1,505
			1,882

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

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
100 EMERSON ELECTRIC CO	P	2011-05-11	2014-10-03
50 EMERSON ELECTRIC CO	P	2011-08-02	2014-10-03
150 EMERSON ELECTRIC CO	P	2012-09-24	2014-10-03
1000 FINANCIAL SELECT SECTOR	P	2008-06-26	2014-04-03
500 FINANCIAL SELECT SECTOR	P	2008-09-29	2014-04-03
200 STERICYCLE	P	2005-02-15	2014-04-03
350 UTILITIES SELECT SECTOR	P	2007-03-02	2014-04-03
300 WISDOMTREE EMERGING MKTS	P	2012-02-16	2014-10-03
720 WISDOMTREE EMERGING MKTS	P	2012-02-16	2014-10-03
80 WISDOMTREE EMERGING MKTS	P	2012-02-16	2014-10-03

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
6,261		5,461	800
3,130		2,386	744
9,391		7,528	1,863
22,377		21,208	1,169
11,189		9,308	1,881
22,771		4,609	18,162
14,432		13,451	981
13,790		14,271	-481
33,096		34,236	-1,140
3,677		3,805	-128

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
			800
			744
			1,863
			1,169
			1,881
			18,162
			981
			-481
			-1,140
			-128

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

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
45 VANGUARD SHORT-TERM BOND ETF	P	2011-10-11	2014-11-18
700 VANGUARD SHORT-TERM BOND ETF	P	2011-10-11	2015-03-23
800 ENTERPRISE PRODUCTS	P	2006-11-02	2014-10-08
K-1 SEC 1231 GAIN	P		
CAPITAL GAINS DIVIDENDS	P		

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
3,605		3,644	-39
56,253		56,690	-437
31,429		9,892	21,537
3			3
17,022			17,022

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			-39
			-437
			21,537
			3
			17,022

Form 990PF Part VIII Line 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
MRS JEAN WRIGHT 9889 HOLLOW ROAD PATASKALA, OH 43062	PRESIDENT 2 00	0	0	0
RICHARD T CLARK PO BOX 382 JOHNSTOWN, OH 43031	DIRECTOR 2 00	0	0	0
MARY C THOMAS 5528 JOHNSTOWN-ALEXANDRIA ROAD JOHNSTOWN, OH 43031	SECRETARY 2 00	0	0	0
SCOTT E SHILLING 6650 WALNUT STREET NEW ALBANY, OH 43054	TREASURER 2 00	0	0	0
TODD DODDERER 3460 BEECH ROAD JOHNSTOWN, OH 43031	DIRECTOR 2 00	0	0	0
STEVEN H WILLIAMS 11704 APPLETON RD CROTON, OH 43013	VICE PRESIDENT 2 00	0	0	0
MRS SHARON JOHNSON 66 EAST DOUGLAS STREET JOHNSTOWN, OH 43031	DIRECTOR 2 00	0	0	0
TERRY A PRIEST 128 STONE HEDGE ROW DRIVE JOHNSTOWN, OH 43031	DIRECTOR 2 00	0	0	0
CHARLES WALKER 4012 DUTCH LANE RD JOHNSTOWN, OH 43031	DIRECTOR 2 00	0	0	0

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
JOHNSTOWN UNITED METHODIST CHURCH 159 S MAIN ST JOHNSTOWN, OH 43031	N/A	N/A	FREEDOM SCHOOL EDUCATIONAL & ENRICHMENT PROGRAM	5,000
APPLE BLOSSOM FLOWERS LANDSCAPING 225 EDWARDS RD JOHNSTOWN, OH 43037	N/A	N/A	FLOWERS AND LANDSCAPING OF TOWN SQUARELANDSCAPING TOWN SQUARE	5,425
JOHNSTOWN MONROE SCHOOLS 441 S MAIN ST JOHNSTOWN, OH 43031	N/A	N/A	SUPPORT	2,250
CHURCH OF THE ACENSION 555 S MAIN ST JOHNSTOWN, OH 43031	N/A	PC	SUPPORT	450
LICKING COUNTY FOUNDATION-BABCOCK FUND 30 N SECOND STREET NEWARK, OH 43055	N/A	PC	DONATION TO BABCOCK FUND	69,400
RENSELAER POLYTECHNIC INSTITUTE 110 EIGHTH ST TROY, NY 12180	N/A	N/A	SCHOLARSHIP FOR BRANDON ECKSTEIN	1,500
NEWARK GRANVILLE SYMPHONY ORCHESTRA PO BOX 566 GRANVILLE, OH 43023	N/A	N/A	PLAY FOR JOHNSTOWN HIGH SCHOOL STUDENTS	1,300
OHIO STATE UNIVERSITY PO BOX 182646 COLUMBUS, OH 432182646	N/A	N/A	SCHOLARSHIP FOR ARAN WHISLER	1,500
KASSON MANOR LANDSCAPING 58 SOUTH MAIN ST JOHNSTOWN, OH 43031	N/A	N/A	4 NEW WELCOME TO JOHNSTOWN SIGNS	10,800
Total			3a	97,625

TY 2014 Accounting Fees Schedule

Name: THE MARY E BABCOCK FOUNDATION

EIN: 31-1170451

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX PREP	1,501	0	0	0

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2014 Gain/Loss from Sale of Other Assets Schedule

Name: THE MARY E BABCOCK FOUNDATION

EIN: 31-1170451

Name	Date Acquired	How Acquired	Date Sold	Purchaser Name	Gross Sales Price	Basis	Basis Method	Sales Expenses	Total (net)	Accumulated Depreciation
800 ENTERPRISE PRODUCTS	2006-11	PURCHASED	2014-10		7,473			0	7,473	

**TY 2014 Investments Corporate
Bonds Schedule**

Name: THE MARY E BABCOCK FOUNDATION

EIN: 31-1170451

Name of Bond	End of Year Book Value	End of Year Fair Market Value
VANGUARD SHORT TERM BOND ETF	88,689	88,572
LOOMIS SAYLES BOND FUND	34,860	33,817

**TY 2014 Investments Corporate
Stock Schedule****Name:** THE MARY E BABCOCK FOUNDATION**EIN:** 31-1170451

Name of Stock	End of Year Book Value	End of Year Fair Market Value
PNC FINANCIAL SERVICES GROUP	30,261	14,545
HUNTINGTON BANCSHARES	6,760	5,348
ABBOT LABORATORIES	8,713	16,910
JOHNSON & JOHNSON	28,988	50,300
EXXON MOBIL	16,643	23,375
GENERAL ELECTRIC	16,587	26,051
PROCTOR & GAMBLE CO	16,474	22,534
DUKE ENERGY	11,450	23,955
AT&T INC	15,894	19,590
ILLINOIS TOOL WORKS INC	16,515	29,142
KELLOGG CO	17,471	23,083
QUALCOMM INCORPORATED	11,505	17,335
CORE LABORATORIES NV	4,183	10,449
CHEVRON CORP	18,295	24,670
PARK NATIONAL CORP	18,838	25,668
RENAISSANCE RE HOLDINGS LTD	11,111	19,946
ABB VIE INC	9,449	21,367
LINEAR TECH CORP	13,012	18,720
MARSH & MCLENNAN CORP	18,207	28,045

TY 2014 Investments - Other Schedule

Name: THE MARY E BABCOCK FOUNDATION

EIN: 31-1170451

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
VANGUARD EUROPEAN STOCK INDEX FUND	AT COST	30,393	22,637
VANGUARD INSTITUTIONAL EXTENDED MARKET INDEX	AT COST	30,393	51,720
VANGUARD INSTITUTIONAL INDEX FUND	AT COST	91,180	130,019
VANGUARD PACIFIC STOCK INDEX FUND	AT COST	30,393	26,440
ISHARES CORE S&P MID-CAP ETF	AT COST	58,887	71,127
ISHARES CORE S&P SMALL-CAP ETF	AT COST	56,781	70,818
ISHARES MSCI EAFE ETF	AT COST	55,322	57,753
VANGUARD SMALL-CAP GROWTH	AT COST	53,520	65,099
AMERICAN FDS-EUROPACIFIC GROWTH	AT COST	57,700	65,820
AQR MANAGED FUTURES FD	AT COST	32,400	37,592
DFA INTERNATIONAL SMALL CAP VLAUE	AT COST	58,700	63,325
DFA REAL ESTATE SEC FD	AT COST	30,175	38,734
DFA US LARGE CAP VLAUE FD	AT COST	145,676	166,716
DFA US TARGETED VALUE FD	AT COST	61,300	66,669
DIAMOND-HILL LARGE-CAP FD	AT COST	143,800	154,751
DODGE & COX INTERNATIONAL STOCK FD	AT COST	56,500	65,390
HARBOR CAPITAL APPRECIATION FD	AT COST	76,421	86,427
INVESCO BALANCED-RISK ALLOCATION FD	AT COST	43,400	41,605
VANGUARD 500 INDEX FD	AT COST	147,500	164,919
VANGUARD MID-CAP GROWTH	AT COST	74,936	90,964
VANGUARD FTSE EMERGING MARKETS ETF	AT COST	9,654	9,604
PARAMETRIC EMERGING MARKETS FUND	AT COST	54,800	50,447

TY 2014 Other Decreases Schedule**Name:** THE MARY E BABCOCK FOUNDATION**EIN:** 31-1170451

Description	Amount
PARTNERSHIP INCOME & GAIN OVER DISTRIBUTION	8,413

TY 2014 Other Expenses Schedule

Name: THE MARY E BABCOCK FOUNDATION

EIN: 31-1170451

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INSURANCE	1,024	0	0	0
SAFE DEPOSIT BOX	48	0	0	0
STATE FILING FEES	200	0	0	0
POSTAGE	124	0	0	0
AWARDS	48	0	0	48

TY 2014 Other Income Schedule

Name: THE MARY E BABCOCK FOUNDATION

EIN: 31-1170451

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
ENTERPRISE PRODUCTS	338	338	

TY 2014 Other Increases Schedule

Name: THE MARY E BABCOCK FOUNDATION

EIN: 31-1170451

Description	Amount
RETURNED GIFT	7,500

TY 2014 Other Professional Fees Schedule

Name: THE MARY E BABCOCK FOUNDATION

EIN: 31-1170451

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNT MANAGEMENT FEES	7,332	7,332	0	0
AGENCY FEES	3,447	3,447	0	0

TY 2014 Taxes Schedule

Name: THE MARY E BABCOCK FOUNDATION

EIN: 31-1170451

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAX WITHHELD	31	31	0	0
FEDERAL EXCISE	2,385	0	0	0