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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 instructions is at www.irs.gov/form990pf.

OMB No 1545-0052

2014

Open to Public Inspection

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

Name of foundation LOEB FAMILY FOUNDATION INC C/O REGIONS BANK TRUST DEPARTMENT		A Employer identification number 63-0960783	
Number and street (or P O box number if mail is not delivered to street address) PO BOX 2450		Room/suite	B Telephone number (see instructions) (334) 230-6100
City or town, state or province, country, and ZIP or foreign postal code MONTGOMERY, AL 361022450		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 ☐	
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)▶\$ 6,222,901		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, column (d) must be on cash basis.)			

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(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)				
	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.	143,783	143,783		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	118,215			
	b Gross sales price for all assets on line 6a 1,396,239				
	7 Capital gain net income (from Part IV, line 2) . . .		118,215		
	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)	4,752	4,752		
	12 Total. Add lines 1 through 11	266,750	266,750		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0	0		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	1,895	0		0
	c Other professional fees (attach schedule)	49,788	49,788		0
	17 Interest				
	18 Taxes (attach schedule) (see instructions) . . .	19,887	3,388		0
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)				
	24 Total operating and administrative expenses. Add lines 13 through 23	71,570	53,176		0
	25 Contributions, gifts, grants paid	298,641			298,641
	26 Total expenses and disbursements. Add lines 24 and 25	370,211	53,176		298,641
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-103,461			
	b Net investment income (if negative, enter -0-)		213,574		
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	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	403,121	202,069	202,069
	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)	3,201,694	3,516,625	5,161,745
	c	Investments—corporate bonds (attach schedule).	1,037,819	820,479	859,087
	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)	4,642,634	4,539,173	6,222,901	
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 ▶ ☐ 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	3,072,791	3,072,791	
28		Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
29		Retained earnings, accumulated income, endowment, or other funds	1,569,843	1,466,382	
30		Total net assets or fund balances (see instructions)	4,642,634	4,539,173	
31		Total liabilities and net assets/fund balances (see instructions) . . .	4,642,634	4,539,173	

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 4,642,634
2	Enter amount from Part I, line 27a	2 -103,461
3	Other increases not included in line 2 (itemize) ▶ _____	3 0
4	Add lines 1, 2, and 3	4 4,539,173
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 4,539,173

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	REGIONS SHORT TERM SECURITIES	P		
b	REGIONS LONG TERM SECURITIES	P		
c	CAPITAL GAINS DIVIDENDS	P		
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 415,323		425,864	-10,541
b 965,192		852,160	113,032
c 15,724			15,724
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(I) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a			-10,541
b			113,032
c			15,724
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	118,215
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	256,115	5,847,477	0 043799
2012	270,912	5,454,926	0 049664
2011	265,756	5,381,892	0 049380
2010	275,633	5,413,302	0 050918
2009	238,010	5,115,391	0 046528

2	Total of line 1, column (d).	2	0 240289
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 048058
4	Enter the net value of noncharitable-use assets for 2014 from Part X, line 5.	4	6,203,904
5	Multiply line 4 by line 3.	5	298,147
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	2,136
7	Add lines 5 and 6.	7	300,283
8	Enter qualifying distributions from Part XII, line 4.	8	298,641

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			
b		Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b		1	4,271
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	4,271
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	4,271
6		Credits/Payments			
a		2014 estimated tax payments and 2013 overpayment credited to 2014	6a	9,360	
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	9,360
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	5,089
11		Enter the amount of line 10 to be Credited to 2015 estimated tax ☐ 4,280 Refunded ☐		11	809

Part VII-A

Statements Regarding Activities

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	Yes	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		No
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?		2		No
		If "Yes," attach a detailed description of the activities.				
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?		5		No
		If "Yes," attach the statement required by General Instruction T.				
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) ☐ AL				
b		If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation .		8b	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 N/A				
14	The books are in care of REGIONS BANK TRUST DEPARTMENT Telephone no (334) 230-6105 Located at 201 MONROE STREET 4TH FLOOR MONTGOMERY AL ZIP +4 36104			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here	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?	16	Yes	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.			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		
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
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.	0

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	6,052,760
b	Average of monthly cash balances.	1b	245,620
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	6,298,380
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	6,298,380
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	94,476
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	6,203,904
6	Minimum investment return. Enter 5% of line 5.	6	310,195

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	310,195
2a	Tax on investment income for 2014 from Part VI, line 5.	2a	4,271
b	Income tax for 2014 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	4,271
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	305,924
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	305,924
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	305,924

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	298,641
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	298,641
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions).	5	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	298,641
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				305,924
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only.			25,382	
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 ▶ \$ 298,641				
a Applied to 2013, but not more than line 2a			25,382	
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.				273,259
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).)	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				32,665
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 XIVPrivate 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)

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	Tax year	Prior 3 years			(e) Total
		(a) 2014	(b) 2013	(c) 2012	(d) 2011	
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 XVSupplementary 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))

JOAN B LOEB

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 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

Form 990-PF (2014)

Part XV

Supplementary Information (continued)

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 Paid during the year See Additional Data Table				
Total			3a	298,641
b Approved for future payment				
Total			3b	0

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2014)

Part XVII

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

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.

2015-05-19

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

RITA O BROWN

Preparer's Signature

Date

2015-05-19

Check if self-employed

☐

PTIN

P00187607

Firm's name

JACKSON THORNTON & CO PC

Firm's address

P O BOX 96 MONTGOMERY, AL 361010096

Firm's EIN

63-1035228

Phone no

(334) 834-7660

Form 990-PF (2014)

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
REGIONS BANK TRUST DEPARTMENT	TRUSTEE 2 00	0	0	0
201 MONROE STREET MONTGOMERY,AL 36104				
JOAN B LOEB	BOARD OF DIRECTORS 0 00	0	0	0
2244 FERNWAY DRIVE MONTGOMERY,AL 36111				
ELIZABETH L FRIEDMAN	BOARD OF DIRECTORS 0 00	0	0	0
1306 WASHINGTON AVENUE SANTA MONICA,CA 90403				
HELEN R LOEB	BOARD OF DIRECTORS 0 00	0	0	0
2921 CANTERBURY COURT MONTGOMERY,AL 36111				
PATRICIA L ROSENBAUM	BOARD OF DIRECTORS 0 00	0	0	0
4278 LAKEHAVEN DRIVE NE ATLANTA,GA 30319				
JAMES L LOEB JR	BOARD OF DIRECTORS 0 00	0	0	0
PO BOX 909 MONTGOMERY,AL 36101				

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>				
A-PLUS EDUCATION PO BOX 4433 MONTGOMERY,AL 36103			EDUCATIONAL	200
ALABAMA FOLKLIFE ASSOCIATION PO BOX 4697 MONTGOMERY,AL 36103			CULTURAL/EDUCATIONAL	100
ALABAMA HERITAGE - UNIVERSITY OF ALABAMA PO BOX 870122 TUSCALOOSA,AL 35487			CULTURAL/EDUCATIONAL	150
ALABAMA INSTITUTE FOR DEAF & BLIND 2629 EASTERN BLVD MONTGOMERY,AL 36117			HUMANITARIAN	250
ALABAMA PUBLIC TELEVISION PO BOX 2153 BIRMINGHAM,AL 35287			EDUCATIONAL	240
ALABAMA SHAKESPEARE FESTIVAL 1 FESTIVAL DRIVE MONTGOMERY,AL 36117			CULTURAL/EDUCATIONAL	22,350
ALABAMA SPECIAL OLYMPICS PO BOX 1087 MONTGOMERY,AL 361011087			HUMANITARIAN	150
ALABAMA TRUST FOR HISTORIC PRESERVATION STATION 45 LIVINGSTON,AL 35470			CULTURAL/EDUCATIONAL	150
ALLIANCE THEATRE COMPANY 1280 PEACHTREE STREET NE ATLANTA,GA 30309			CULTURAL/EDUCATIONAL	6,000
ALZHEIMER'S ASSOCIATION PO BOX 96011 WASHINGTON,DC 200906011			HUMANITARIAN	200
AMERICAN CANCER SOCIETY 3054 MCGEHEE ROAD MONTGOMERY,AL 36111			HUMANITARIAN	100
AMERICAN DIABETES ASSOCIATION PO BOX 1834 MERRIFIELD,VA 221168034			HUMANITARIAN	150
AMERICAN HEART ASSOCIATION PO BOX 78851 PHOENIX,AZ 850628851			HUMANITARIAN	100
AMERICAN JEWISH COMMITTEE 165 EAST 56TH STREET NEWYORK,NY 10022			RELIGIOUS	2,000
AMERICAN LUNG ASSOCIATION PO BOX 7000 ALBERT LEQ,MN 56007			HUMANITARIAN	100
Total  3a				298,641

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>				
AMERICAN PARKINSONS DISEASE ASSOCIATION 135 PARKINSON AVENUE STATEN ISLAND,NY 10305			HUMANITARIAN	300
AMERICAN RED CROSS PO BOX 96454 WASHINGTON,DC 200906454			HUMANITARIAN	250
AMNESTY INTERNATIONAL 5 PENN PLAZA NEWYORK,NY 10001			CULTURAL/EDUCATIONAL	500
ANTI-DEFAMATION LEAGUE 605 THIRD AVENUE NEWYORK,NY 10158			CULTURAL/EDUCATIONAL	800
ARTHRITIS FOUNDATION PO BOX 96280 WASHINGTON,DC 200906280			HUMANITARIAN	200
ARTS FOR LEARNING 171 MADISON AVENUE SUITE 200 NEWYORK,AL 100165110			EDUCATIONAL	2,000
ATLANTA HISTORY CENTER 130 WEST PACES FERRY ROAD NW ATLANTA,GA 30305			EDUCATIONAL	500
ATLANTA SYMPHONY ORCHESTRA 1293 PEACHTREE STREET NE SUITE 300 ATLANTA,GA 30309			CULTURAL/EDUCATIONAL	1,500
BABSON COLLEGE 231 FOREST STREET BABSON PARK,MA 02457			EDUCATIONAL	2,000
BIG SUNDAY 6111 MELROSE AVENUE LOS ANGELES,CA 90038			HUMANITARIAN	500
BIRMINGHAM AIDS OUTREACH 205 32ND STREET SOUTH SUITE 101 BIRMINGHAM,AL 35233			HUMANITARIAN	2,000
BOY SCOUTS OF AMERICA-TUKABATCHEE 3067 CARTER HILL ROAD MONTGOMERY,AL 36111			HUMANITARIAN	1,000
BOYS AND GIRLS CLUB 5995 CHRISTY LANE MONTGOMERY,AL 36116			CULTURAL/EDUCATIONAL	200
BRADY CENTER TO PREVENT GUN VIOLENCE PO BOX 96627 WASHINGTON,DC 20090			HUMANITARIAN	1,300
BRANTWOOD CHILDREN'S HOME 1309 UPPER WETUMPKA ROAD MONTGOMERY,AL 36107			HUMANITARIAN	300
Total  3a				298,641

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 Paid during the year				
BRIDGEBUILDERS 1125 EAST FAIRVIEW AVENUE MONTGOMERY, AL 36106			HUMANITARIAN	2,500
BRIGHT STAR SCHOOL 2636 MANSFIELD AVENUE LOS ANGELES, CA 90016			EDUCATIONAL	500
CAMP ASCCA COUNTY ROAD 83 JACKSON GAP, AL 36861			HUMANITARIAN/EDUCATIONAL	100
CAMP SUNSHINE 145 COLISEUM BLVD MONTGOMERY, AL 36109			HUMANITARIAN	300
CAMP TWIN LAKES 600 MEANS STREET STE 110 ATLANTA, GA 30318			HUMANITARIAN	500
CAPRI COMMUNITY FILM SOCIETY 1045 EAST FAIRVIEW AVENUE MONTGOMERY, AL 36117			CULTURAL/EDUCATIONAL	300
CARE ALABAMA 2544 WILLOW POINT ROAD ALEXANDER CITY, AL 35011			HUMANITARIAN	200
CENTRAL ALABAMA COMMUNITY FOUNDATION 424 N MCDONOUGH STREET MONTGOMERY, AL 36104			CULTURAL/EDUCATIONAL	20,000
CHILD PROTECT 935 SOUTH PERRY STREET MONTGOMERY, AL 36104			HUMANITARIAN	300
CHILDRENS DEFENSE FUND 25 E STREET NW WASHINGTON, DC 20001			HUMANITARIAN	100
CHRISTOPHER & DANA REEVE FOUNDATION 636 MORRIS TURNPIKE SUITE 3A SHORT HILLS, NJ 07078			HUMANITARIAN	2,500
COLONIAL WILLIAMSBURG FOUNDATION PO BOX 1776 WILLIAMSBURG, VA 23187			CULTURAL/EDUCATIONAL	250
DOCTORS WITHOUT BORDERS 333 7TH AVENUE 2ND FLOOR NEW YORK, NY 10001			HUMANITARIAN	500
EASTER SEALS PO BOX 1482 HAGERSTOWN, MD 217419953			HUMANITARIAN	100
EMORY EYE INSTITUTE 875 JOHNSON FERRY ROAD NE ATLANTA, GA 30342			EDUCATIONAL	1,000
Total  3a				298,641

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 Paid during the year				
EVERY CHILD FOUNDATION PO BOX 1808 PACIFIC PALISADES,CA 90272			HUMANITARIAN	5,000
FAITH RESCUE MISSION 108 CAMDEN STREET MONTGOMERY,AL 36104			HUMANITARIAN	200
FOCAL 3703 ROSA L PARKS AVENUE MONTGOMERY,AL 36105			HUMANITARIAN	100
FRIENDS OF MONTGOMERY PUBLIC LIBRARY 245 HIGH STREET MONTGOMERY,AL 36101			CULTURAL/EDUCATIONAL	200
FRIENDS OF THE ALABAMA ARCHIVES 624 WASHINGTON AVENUE MONTGOMERY,AL 361300100			CULTURAL/EDUCATIONAL	200
FRIENDS OF THE ALABAMA GOVERNORS MANSION 1001 SOUTH HULL STREET MONTGOMERY,AL 36104			HUMANITARIAN	100
FULFULLMENT FUND 6100 WILSHIRE BLVD STE 600 LOS ANGELES,CA 900489112			HUMANITARIAN	500
GENDER IDENTITY CENTER OF COLORADO 1151 SOUTH HURON STREET DENVER,CO 80223			HUMANITARIAN	2,000
GEORGE WEST MENTAL HEALTH FOUNDATION 1903 NORTH DRUID HILLS ROAD ATLANTA,GA 30319			HUMANITARIAN	1,000
GIRLS SCOUTS PO BOX 5046 NEWYORK,NY 100875046			CULTURAL/EDUCATIONAL	200
GLAUCOMA FOUNDATION 80 MAIDEN LN STE 700 NEWYORK,NY 102730672			HUMANITARIAN	500
HIGH MUSEUM OF ART 1280 PEACHTREE STREET NE ATLANTA,GA 30309			CULTURAL/EDUCATIONAL	1,500
HOSPICE OF MONTGOMERY 1111 HOLLOWAY PARK MONTGOMERY,AL 36117			HUMANITARIAN	300
HUMANE SOCIETY 1150 JOHN OVERTON DRIVE MONTGOMERY,AL 36110			HUMANITARIAN	100
HUNTINGDON COLLEGE 1500 E FAIRVIEW MONTGOMERY,AL 36106			EDUCATIONAL	6,000
Total  3a				298,641

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>				
INDIAN SPRINGS SCHOOL 190 WOODWARD DRIVE INDIAN SPRINGS,AL 35124			CULTURAL/EDUCATIONAL	4,000
INSTITUTE OF SOUTHERN JEWISH LIFE PO BOX 16528 JACKSON,MS 39236			RELIGIOUS	1,000
INTERFAITH ALLIANCE 1212 NEW YORK AVENUE NW SUITE 1250 WASHINGTON,DC 20005			HUMANITARIAN	150
INTERNATIONAL RESCUE COMMITTEE PO BOX 98152 WASHINGTON,DC 200908152			CULTURAL/EDUCATIONAL	500
JBI INTERNATIONAL 110 E 30TH STREET NEW YORK,NY 100167375			RELIGIOUS	200
JEWISH CHILDREN'S REGIONAL SERVICES PO BOX 7368 METAIRIE,LA 70010			RELIGIOUS	100
JEWISH FAMILY SERVICES OF LOS ANGELES 330 NORTH FAIRFAX AVENUE LOS ANGELES,CA 90036			RELIGIOUS	500
JEWISH FEDERATION PO BOX 54269 LOS ANGELES,CA 90054			RELIGIOUS	8,500
JEWISH FEDERATION OF CENTRAL ALABAMA PO BOX 20058 MONTGOMERY,AL 36120			RELIGIOUS	15,000
JEWISH FEDERATION OF GREATER ATLANTA 1440 SPRING STREET NW ATLANTA,GA 30309			RELIGIOUS	1,250
JOY TO LIFE 5401 TAYLOR ROAD MONTGOMERY,AL 36117			HUMANITARIAN	200
LANDMARKS FOUNDATION 301 COLUMBUS STREET MONTGOMERY,AL 36104			HUMANITARIAN	1,000
LOS ANGELES COUNTY MUSEUM OF ART 5905 WILSHIRE BLVD LOS ANGELES,CA 90036			CULTURAL/EDUCATIONAL	600
LOS ANGELES REGIONAL FOODBANK 1734 EAST 41ST STREET VERNON,CA 90058			HUMANITARIAN	1,000
MACULAR DEGENERATION RESEARCH 22512 GATEWAY CENTER DRIVE CLARKSBURG,MD 20871			HUMANITARIAN	500
Total  3a				298,641

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>				
MAKE-A-WISH FOUNDATION PO BOX 97104 WASHINGTON,DC 200907104			HUMANITARIAN	100
MEDICAL OUTREACH MINISTRIES 1301 EAST SOUTHERN BLVD MONTGOMERY,AL 36116			HUMANITARIAN	200
METROPOLITAN OPERA GUILD 30 LINCOLN CENTER NEWYORK,NY 101330037			CULTURAL/EDUCATIONAL	100
MIRACLE FLIGHTS FOR KIDS 2764 NORTH GREEN VALLEY PARKWAY 115 GREEN VALLEY,NV 89014			HUMANITARIAN	100
MONTGOMERY AIDS OUTREACH PO BOX 11087 MONTGOMERY,AL 361110087			HUMANITARIAN	200
MONTGOMERY AREA COUNCIL ON AGING 115 EAST JEFFERSON STREET MONTGOMERY,AL 36104			HUMANITARIAN	3,000
MONTGOMERY AREA FOOD BANK 521 TRADE CENTER STREET MONTGOMERY,AL 361082107			HUMANITARIAN	10,000
MONTGOMERY BALLET COMPANY 3201 BOXWOOD DRIVE MONTGOMERY,AL 36111			CULTURAL/EDUCATIONAL	150
MONTGOMERY CHAMBER MUSIC ORG PO BOX 6454 MONTGOMERY,AL 36106			CULTURAL/EDUCATIONAL	500
MONTGOMERY MUSEUM OF FINE ARTS 1 MUSEUM DRIVE MONTGOMERY,AL 36117			CULTURAL/EDUCATIONAL	28,000
MONTGOMERY MUSIC PROJECT PO BOX 1864 MONTGOMERY,AL 36102			CULTURAL/EDUCATIONAL	200
MONTGOMERY OAK PARK GARDENS 1010 FOREST AVENUE MONTGOMERY,AL 36106			HUMANITARIAN	100
MONTGOMERY SYMPHONY ASSOC 301 NORTH HULL STREET MONTGOMERY,AL 36104			CULTURAL/EDUCATIONAL	5,000
MONTGOMERY ZOO 2301 COLISEUM PARK MONTGOMERY,AL 36110			CULTURAL/EDUCATIONAL	200
MUSEUM OF SOUTHERN JEWISH EXPERIENCE 4915 1-55 NORTH 100A JACKSON,MS 39206			CULTURAL/EDUCATIONAL	100
Total  3a				298,641

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>				
NAMI CALIFORNIA 1010 HURLEY WAY SUITE 195 SACRAMENTO,CA 958253218			HUMANITARIAN	500
NAMI MONTGOMERY 437 MULLIGAN DRIVE MONTGOMERY,AL 36117			HUMANITARIAN	750
NATIONAL COUNCIL OF JEWISH WOMEN PO BOX 1408 TOMS RIVER,NJ 087541408			RELIGIOUS	200
NATIONAL TRUST FOR HISTORIC PRESERVATION PO BOX 5043 HAGERSTOWN,MD 21741			CULTURAL/EDUCATIONAL	500
NATURE CONSERVANCY PO BOX 6017 ALBERT LEA,MN 560078011			CULTURAL/EDUCATIONAL	300
NEWISRAEL FUND 330 SEVENTH AVENUE 11 FLOOR NEWYORK,NY 10001			RELIGIOUS	1,500
OXFAM PO BOX 7011 ALBERT LEA,MN 56007			HUMANITARIAN	500
PACE ACADEMY 966 WEST PACES FERRY ROAD NW ATLANTA,GA 30327			EDUCATIONAL	9,000
PEOPLE FOR THE AMERICAN WAY PO BOX 96200 WASHINGTON,DC 200777520			CULTURAL/EDUCATIONAL	125
PLANNED PARENTHOOD PO BOX 60677 LOS ANGELES,CA 90060			HUMANITARIAN	1,500
PROJECT HOPE 255 CARTER HALL LANE MILLWOOD,VA 22646			HUMANITARIAN	200
REBUILDING TOGETHER - CENTRAL AL PO BOX 4731 MONTGOMERY,AL 36103			HUMANITARIAN	1,000
RENASECENCE 215 CLAYTON STREET MONTGOMERY,AL 36104			CULTURAL/EDUCATIONAL	250
RESURRECTION CATHOLIC MISSIONS 2815 FORBES DRIVE MONTGOMERY,AL 36110			RELIGIOUS	100
RIVER REGION UNITED WAY 532 S PERRY STREET MONTGOMERY,AL 36104			HUMANITARIAN	20,000
Total  3a				298,641

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>				
SAFE PLACE FOR YOUTH 2554 LINCOLN BLVD 454 VENICE,CA 90291			HUMANITARIAN	10,000
SALVATION ARMY PO BOX 210307 MONTGOMERY,AL 36121			HUMANITARIAN	1,000
SKYLAND TRAILS 1961 NORTH DRUID HILLS ROAD NE ATLANTA,GA 30329			HUMANITARIAN	10,000
SMILE TRAIN PO BOX 96231 WASHINGTON,DC 200906231			HUMANITARIAN	125
SPLC 400 WASHINGTON AVENUE MONTGOMERY,AL 36104			CULTURAL/EDUCATIONAL	50
ST JAMES SCHOOL 6010 VAUGHN ROAD MONTGOMERY,AL 36116			EDUCATIONAL	6,000
ST JUDES CHILDREN'S RESEARCH HOSPITAL 262 DANNY THOMAS PL MEMPHIS,TN 38105			HUMANITARIAN	300
SUMMER CAMP 8 CHURCH STREET BRIDGTON,ME 04574			CULTURAL/EDUCATIONAL	300
SUNSHINE CENTER PO BOX 5160 MONTGOMERY,AL 36103			HUMANITARIAN	3,100
TEMPLE BETH OR 2246 ANRROW LANE ROAD MONTGOMERY,AL 36106			RELIGIOUS	23,750
TEMPLE ISAIAH 10345 WPICO BLVD LOS ANGELES,CA 90064			RELIGIOUS	4,736
TEMPLE SINAI 5645 DUPRESS DRIVE NW ATLANTA,GA 30327			RELIGIOUS	9,100
TOUCHSTONE - JACKSON HOSPITAL 1725 PINE STREET MONTGOMERY,AL 36106			HUMANITARIAN	250
US HOLOCAUST MUSEUM PO BOX 7023 ALBERT LEA,MN 560078023			CULTURAL/EDUCATIONAL	300
UNICEF PO BOX 27708 NEWARK,NJ 071017708			HUMANITARIAN	1,000
Total  3a				298,641

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 Paid during the year				
UNION OF COUNCILS FOR JEWS IN THE FORMER SOVIET UNION 2200 PENNSYLVANIA AVENUE WASHINGTON,DC 20037			CULTURAL/EDUCATIONAL	100
UNITED WAY OF METRO ATLANTA PO BOX 2692 ATLANTA,GA 30301			HUMANITARIAN	1,500
UNIVERSITY OF NORTH CAROLINA - CHAPEL HILL 208 W FRANKLIN STREET CHAPEL HILL,NC 27599			EDUCATIONAL	200
VENICE FAMILY CLINIC 604 ROSE AVENUE VENICE,CA 90291			CULTURAL/EDUCATIONAL	2,000
WELLESLEY COLLEGE 106 CENTRAL ST WELLESLEY,MA 02481			EDUCATIONAL	2,000
WESTSIDE FAMILY YMCA 11311 LA GRANGE AVENUE LOS ANGELES,CA 90025			CULTURAL/EDUCATIONAL	5,500
WINWARD SCHOOL 11350 PALMS BLVD LOS ANGELES,CA 90066			EDUCATIONAL	2,500
WORLD VISION PO BOX 9716 FEDERAL WAY,WA 98063			HUMANITARIAN	2,565
WOUNDED WARRIOR PROJECT 4899 BELFORT ROAD SUITE 300 JACKSONVILLE,FL 32256			HUMANITARIAN	100
ZABAN NIGHT SHELTER 1589 PEACHTREE STREET NE ATLANTA,GA 30309			HUMANITARIAN	500
20X20X20 PO BOX 96669 WASHINGTON,DC 20090			HUMANITARIAN	150
Total  3a				298,641

TY 2014 Accounting Fees Schedule

Name: LOEB FAMILY FOUNDATION INC
C/O REGIONS BANK TRUST DEPARTMENT
EIN: 63-0960783

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX PREP FEE	1,895	0		0

**TY 2014 Investments Corporate
Bonds Schedule**

Name: LOEB FAMILY FOUNDATION INC
C/O REGIONS BANK TRUST DEPARTMENT
EIN: 63-0960783

Name of Bond	End of Year Book Value	End of Year Fair Market Value
CORPORATE BONDS	820,479	859,087

TY 2014 Investments Corporate Stock Schedule

Name: LOEB FAMILY FOUNDATION INC

C/O REGIONS BANK TRUST DEPARTMENT

EIN: 63-0960783

Name of Stock	End of Year Book Value	End of Year Fair Market Value
CORPORATE STOCK	3,516,625	5,161,745

TY 2014 Other Income Schedule

Name: LOEB FAMILY FOUNDATION INC
C/O REGIONS BANK TRUST DEPARTMENT
EIN: 63-0960783

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
SECURITIES LITIGATION	4,752	4,752	4,752

TY 2014 Other Professional Fees Schedule

Name: LOEB FAMILY FOUNDATION INC
C/O REGIONS BANK TRUST DEPARTMENT
EIN: 63-0960783

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT FEE	49,788	49,788		0

TY 2014 Taxes Schedule**Name:** LOEB FAMILY FOUNDATION INC

C/O REGIONS BANK TRUST DEPARTMENT

EIN: 63-0960783

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES WITHHELD	3,388	3,388		0
FORM 990PF BAL DUE & ESTIMATES	16,499	0		0