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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 07-01-2014, and ending 06-30-2015

Name of foundation BREVILLIER VILLAGE FOUNDATION INC		A Employer identification number 25-1548657	
Number and street (or P O box number if mail is not delivered to street address) 5416 East Lake Road		B Telephone number (see instructions) (814) 899-8600	
City or town, state or province, country, and ZIP or foreign postal code Erie, PA 16510		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) ☒ \$ 13,204,819		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)	67,772			
	2 Check ☒ ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	421	421		
	4 Dividends and interest from securities.	39,881	39,881		
	5a Gross rents	33,375	33,375		
	b Net rental income or (loss) _____ -28,356				
	6a Net gain or (loss) from sale of assets not on line 10	96,537			
	b Gross sales price for all assets on line 6a _____ 164,996				
	7 Capital gain net income (from Part IV, line 2) . . .		96,537		
	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)	1,211,801	0	1,211,801	
	12 Total. Add lines 1 through 11	1,449,787	170,214	1,211,801	
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	119,351	0	0	119,351
	14 Other employee salaries and wages	425,448	0	0	425,448
	15 Pension plans, employee benefits	57,944	0	0	57,944
	16a Legal fees (attach schedule)	4,563	0	0	4,563
	b Accounting fees (attach schedule)	12,200	0	0	12,200
	c Other professional fees (attach schedule)	150	0	0	150
	17 Interest	4,830	0	0	4,830
	18 Taxes (attach schedule) (see instructions)	43,781	2,063	0	41,718
	19 Depreciation (attach schedule) and depletion	149,817	25,972	123,845	
	20 Occupancy	118,047	34,357	0	83,690
	21 Travel, conferences, and meetings	13,282	0	0	13,282
	22 Printing and publications	11,808	0	0	11,808
	23 Other expenses (attach schedule)	86,119	27,907	0	58,212
	24 Total operating and administrative expenses. Add lines 13 through 23	1,047,340	90,299	123,845	833,196
	25 Contributions, gifts, grants paid	6,966			6,966
	26 Total expenses and disbursements. Add lines 24 and 25	1,054,306	90,299	123,845	840,162
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	395,481			
	b Net investment income (if negative, enter -0-)		79,915		
	c Adjusted net income (if negative, enter -0-)			1,087,956	

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	193,676	124,730	124,730
	3	Accounts receivable ▶ <u>168</u>			
		Less allowance for doubtful accounts ▶ _____	5,436	168	168
	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)	13,016		
	7	Other notes and loans receivable (attach schedule) ▶ <u>30,266</u>			
		Less allowance for doubtful accounts ▶ <u>0</u>	39,356	30,266	30,266
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges	74,648	76,707	76,707
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	571,474	523,232	523,232
	c	Investments—corporate bonds (attach schedule).			
	11	Investments—land, buildings, and equipment basis ▶ <u>616,770</u>			
	Less accumulated depreciation (attach schedule) ▶ <u>44,573</u>	358,858	572,197	572,197	
12	Investments—mortgage loans				
13	Investments—other (attach schedule)	958,458	1,019,571	1,019,571	
14	Land, buildings, and equipment basis ▶ <u>2,288,356</u>				
	Less accumulated depreciation (attach schedule) ▶ <u>1,097,020</u>	1,286,460	1,191,336	1,191,336	
15	Other assets (describe ▶ _____)	7,808,085	9,666,612	9,666,612	
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)		11,309,467	13,204,819	13,204,819
Liabilities	17	Accounts payable and accrued expenses	483,122	269,892	
	18	Grants payable			
	19	Deferred revenue		6,549	
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)	226,818	188,080	
	22	Other liabilities (describe ▶ _____)	2,702,787	4,526,570	
	23	Total liabilities (add lines 17 through 22)	3,412,727	4,991,091	
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	7,514,800	7,838,529	
	25	Temporarily restricted			
	26	Permanently restricted	381,940	375,199	
	Foundations that do not follow SFAS 117, check here ▶ ☐ and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	Total net assets or fund balances (see instructions)	7,896,740	8,213,728	
	31	Total liabilities and net assets/fund balances (see instructions)	11,309,467	13,204,819	

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 7,896,740
2	Enter amount from Part I, line 27a	2 395,481
3	Other increases not included in line 2 (itemize) ▶ _____	3 0
4	Add lines 1, 2, and 3	4 8,292,221
5	Decreases not included in line 2 (itemize) ▶ _____	5 78,493
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6 8,213,728

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	Land and building - 5435 East Lake Road	P	2007-09-24	2015-04-30
b	Net gains - Mellon investment	P		
c	Net gains - PNC investments	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 82,096	18,325	86,784	13,637
b 78,314			78,314
c 4,586			4,586
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			13,637
b			78,314
c			4,586
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	96,537
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	1,000,361	1,454,684	0.687683
2012	949,173	1,292,687	0.734264
2011	922,823	1,547,568	0.596305
2010	888,369	1,753,833	0.506530
2009	879,060	1,535,467	0.572503

2	Total of line 1, column (d).	2	3.097285
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	0.619457
4	Enter the net value of noncharitable-use assets for 2014 from Part X, line 5.	4	1,520,237
5	Multiply line 4 by line 3.	5	941,721
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	799
7	Add lines 5 and 6.	7	942,520
8	Enter qualifying distributions from Part XII, line 4.	8	840,162

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 VIExcise 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	1,598
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	1,598
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	1,598
6		Credits/Payments			
a		2014 estimated tax payments and 2013 overpayment credited to 2014	6a	1,400	
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	1,400
8		Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached.		8	1
9		Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	199
10		Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		10	
11		Enter the amount of line 10 to be Credited to 2015 estimated tax Refunded		11	

Part VII-AStatements 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)? <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>	1b		No
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? <i>If "Yes," attach a detailed description of the activities.</i>	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes.</i>	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? <i>If "Yes," attach the statement required by General Instruction T.</i>	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV.</i>	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions): ☐ PA			
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>	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)? <i>If "Yes," complete Part XIV.</i>	9		No
10	Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>	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? Website address www.brevillier.org	13		No
14	The books are in care of Cindi S Sebolt CPA Director of Finance Telephone no (814) 899-8600 Located at 5416 East Lake Road Erie PA ZIP +4 16511			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here ☐ and enter the amount of tax-exempt interest received or accrued during the year.	15		
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? ☐ Yes ☒ No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? ☐ Organizations relying on a current notice regarding disaster assistance check here. ☒	1b		
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? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2014.</i>)	3b		No
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))?

YesNo

(2)

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

YesNo

(3)

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

YesNo

(4)

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

YesNo

(5)

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

YesNo

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?

YesNo

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?

YesNo

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?

YesNo

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

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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 Provide support and administrative services to affiliated tax-exempt organizations - Conrad House and Ball Pavilion	833,196
2 Provide tuition reimbursement program to individuals seeking and achieving nursing degrees - 1 individual benefited in current year	6,966
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	1,434,527
b	Average of monthly cash balances.	1b	108,861
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	1,543,388
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	1,543,388
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	23,151
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	1,520,237
6	Minimum investment return. Enter 5% of line 5.	6	76,012

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	76,012
2a	Tax on investment income for 2014 from Part VI, line 5.	2a	1,598
b	Income tax for 2014 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	1,598
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	74,414
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	74,414
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	74,414

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	840,162
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	840,162
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	840,162
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				74,414
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2014				
a From 2009.	802,859			
b From 2010.	801,225			
c From 2011.	846,061			
d From 2012.	885,599			
e From 2013.	930,395			
f Total of lines 3a through e.	4,266,139			
4 Qualifying distributions for 2014 from Part XII, line 4 ▶ \$ 840,162				
a Applied to 2013, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2014 distributable amount.				74,414
e Remaining amount distributed out of corpus	765,748			
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	5,031,887			
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				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions). . .	802,859			
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a	4,229,028			
10 Analysis of line 9				
a Excess from 2010. . . .	801,225			
b Excess from 2011. . . .	846,061			
c Excess from 2012. . . .	885,599			
d Excess from 2013. . . .	930,395			
e Excess from 2014. . . .	765,748			

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))

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

Jeffrey F Wieser
5416 East Lake Road
Erie, PA 16510
(814) 899-8600

b

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

Application for participation in nursing training program Prior education Agreement to future employment in return for earning of tuition cost scholarship

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

No limitation on amount of scholarship Agreement to provide employment services in exchange for non-repayment of scholarship

Form 990-PF (2014)

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

Form **990-PF** (2014)

Enter gross amounts unless otherwise indicated

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

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
Reverend John P Downey	Secretary 1 00	0	0	0
134 West Seventh Street Erie, PA 16501				
Charles Byerly	Board member 1 00	0	0	0
2218 East 30 Street Erie, PA 16510				
Rev Dr Richard Elberfeld	Treasurer 1 00	0	0	0
3105 Springland Terrace Erie, PA 16506				
William McLean	Board member 1 00	0	0	0
604 Rankine Avenue Erie, PA 16511				
David Ruler	Board member 1 00	0	0	0
7555 Buckingham Place Fairview, PA 16415				
Tom Fucci	Board member 1 00	0	0	0
646 Irvine Drive Erie, PA 16511				
Donald Van Slyke	Vice Chairperson 1 00	0	0	0
189 Harbor Road Erie, PA 16511				
Carrie Beckman	Board member 1 00	0	0	0
4725 Clinton Street Erie, PA 16509				
Peggy McCarthy	Chairperson 1 00	0	0	0
4861 South Wayside Drive Erie, PA 16505				
Chrstine McClure	BP President 1 00	0	0	0
120 West Tenth Street Erie, PA 16501				
Cheryl Cass	CH President 1 00	0	0	0
4376 Depot Road Erie, PA 16510				
Jeffrey F Wieser	President 40 00	119,351	18,895	0
2704 Greengarden Boulevard Erie, PA 16509				

Form 990PF Part XVI-A Line 1 - Program service revenue:

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See the instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a Outreach meals					10,013
b Management fees					681,117
c Financial service fees					418,553
d Transportation income					6,599
e Beauty shop income					10,189
f Telephone income					42,436
Internet income					5,664

TY 2014 Accounting Fees Schedule

Name: BREVILLIER VILLAGE FOUNDATION INC

EIN: 25-1548657

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Accounting	12,200	0	0	12,200

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

TY 2014 Depreciation Schedule

Name: BREVILLIER VILLAGE FOUNDATION INC
EIN: 25-1548657

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
Fixed equipment - BT	2010-06-30	218,685	192,835	SL	10 0000000000000	6,025	0	6,025	
Major moveable equipment - BVF	2010-06-30	447,924	276,861	SL	10 0000000000000	33,406	0	33,406	
Land improvements - BT	2010-06-30	91,933	63,627	SL	20 0000000000000	3,451	0	3,451	
building - BVF	2008-06-30	1,418,781	404,190	SL	20 0000000000000	68,316	0	68,316	
Major moveable equipment - BT	2010-06-30	4,642	2,347	SL	10 0000000000000	309	0	309	
Building - BVF - 5435 East Lake Road - Erie, PA	2007-09-24	61,084	16,491	SL	25 0000000000000	1,834	1,834	0	
Land - BVF - 5435 East Lake Road - Erie, PA	2007-09-24	25,700		L		0	0	0	
BUILDING IMPROVEMENTS - BT	2010-06-30	27,775	6,691	SL	10 0000000000000	2,676	0	2,676	
LAND IMPROVEMENTS - BVF	2010-06-30	78,616	26,624	SL	20 0000000000000	9,662	0	9,662	
Building - BVF - 5544 East Lake Road	2011-09-01	111,796	15,839	SL	20 0000000000000	5,590	5,590	0	
Land - BVF - 5544 East Lake Road	2011-09-01	51,250		L		0	0	0	
BUILDING - BVF - 5538 East Lake Road - Erie, PA	2012-07-01	45,954	4,596	SL	20 0000000000000	2,298	2,298	0	
Land - BVF - 5538 East Lake Road - Erie, PA	2012-07-01	26,272		L		0	0	0	
Building - 294 Cambridge Road - Erie, PA	2014-07-01	121,413		SL	20 0000000000000	5,968	5,968	0	
Land - 294 Cambrdge Road - Erie, PA	2014-07-01	21,719		L		0	0	0	
Building - 208 Fischer Road - Erie, PA	2014-08-01	135,003		SL	20 0000000000000	6,187	6,187	0	
BUILDING ADJ - BVF - 5538 East Lake Road - Erie, PA	2014-07-01	73,728		SL	20 0000000000000	4,095	4,095	0	
Land - 208 Fischer Road - Erie, PA	2014-08-01	29,635		L		0	0	0	

TY 2014 Investments Corporate Stock Schedule

Name: BREVILLIER VILLAGE FOUNDATION INC

EIN: 25-1548657

Name of Stock	End of Year Book Value	End of Year Fair Market Value
Corporate stocks	448,955	448,955
Healthcare Ventures Alliance, Inc.	74,277	74,277

TY 2014 Investments - Land Schedule

Name: BREVILLIER VILLAGE FOUNDATION INC

EIN: 25-1548657

Category/ Item	Cost/Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
Building - BVF - 5544 East Lake Road	111,796	21,429	90,367	90,367
Land - BVF - 5544 East Lake Road	51,250	0	51,250	51,250
BUILDING - BVF - 5538 East Lake Road - Erie, PA	45,954	6,894	39,060	39,060
Land - BVF - 5538 East Lake Road - Erie, PA	26,272	0	26,272	26,272
Building - 294 Cambridge Road - Erie, PA	121,413	5,968	115,445	115,445
Land - 294 Cambridge Road - Erie, PA	21,719	0	21,719	21,719
Building - 208 Fischer Road - Erie, PA	135,003	6,187	128,816	128,816
BUILDING ADJ - BVF - 5538 East Lake Road - Erie, PA	73,728	4,095	69,633	69,633
Land - 208 Fischer Road - Erie, PA	29,635	0	29,635	29,635

TY 2014 Investments - Other Schedule**Name:** BREVILLIER VILLAGE FOUNDATION INC**EIN:** 25-1548657

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
Common equity funds	FMV	569,955	569,955
Common fixed income funds	FMV	419,388	419,388
Money market	FMV	29,420	29,420
Accrued interest	AT COST	808	808

TY 2014 Land, Etc. Schedule

Name: BREVILLIER VILLAGE FOUNDATION INC

EIN: 25-1548657

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
Fixed equipment - BT	218,685	198,860	19,825	19,825
Major moveable equipment - BVF	447,924	310,267	137,657	137,657
Land improvements - BT	91,933	67,078	24,855	24,855
building - BVF	1,418,781	472,506	946,275	946,275
Major moveable equipment - BT	4,642	2,656	1,986	1,986
BUILDING IMPROVEMENTS - BT	27,775	9,367	18,408	18,408
LAND IMPROVEMENTS - BVF	78,616	36,286	42,330	42,330

TY 2014 Legal Fees Schedule

Name: BREVILLIER VILLAGE FOUNDATION INC

EIN: 25-1548657

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Legal	4,563	0	0	4,563

TY 2014 Mortgages and Notes Payable Schedule

Name:

BREVILLIER VILLAGE FOUNDATION INC

EIN:

25-1548657

Total Mortgage Amount:

188,080

Item No.	1
Lender's Name	Northwest Savings Bank
Lender's Title	
Relationship to Insider	Financial institution
Original Amount of Loan	500,000
Balance Due	0
Date of Note	
Maturity Date	
Repayment Terms	Demand
Interest Rate	
Security Provided by Borrower	Various assets
Purpose of Loan	Operations
Description of Lender Consideration	
Consideration FMV	

Item No.	2
Lender's Name	Northwest Savings Bank
Lender's Title	
Relationship to Insider	Financial institution
Original Amount of Loan	100,000
Balance Due	90,680
Date of Note	2012-07
Maturity Date	2032-07
Repayment Terms	Monthly
Interest Rate	4.500000000000
Security Provided by Borrower	Various assets
Purpose of Loan	Real estate
Description of Lender Consideration	
Consideration FMV	

Item No.	3
Lender's Name	Northwest Savings Bank
Lender's Title	
Relationship to Insider	Financial institution
Original Amount of Loan	100,000
Balance Due	97,400
Date of Note	2014-08
Maturity Date	2034-09
Repayment Terms	Monthly
Interest Rate	4.400000000000
Security Provided by Borrower	Various assets
Purpose of Loan	Real estate
Description of Lender Consideration	
Consideration FMV	

TY 2014 Other Assets Schedule

Name: BREVILLIER VILLAGE FOUNDATION INC

EIN: 25-1548657

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
Resident funds	13,390	11,420	11,420
Affiliated entities receivable	7,794,695	9,655,192	9,655,192

TY 2014 Other Decreases Schedule**Name:** BREVILLIER VILLAGE FOUNDATION INC**EIN:** 25-1548657

Description	Amount
Unrealized depreciation in investments - PNC Bank	11,482
Unrealized depreciation in investments - Mellon Bank	67,011

TY 2014 Other Expenses Schedule

Name: BREVILLIER VILLAGE FOUNDATION INC

EIN: 25-1548657

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Food	7,759	0	0	7,759
O ther supplies	19,603	0	0	19,603
Insurance	6,726	0	0	6,726
O ffice expense	24,124	0	0	24,124
Investment fees	15,723	15,723	0	0
Fundraising expenses	10,782	10,782	0	0
Supplies	1,402	1,402		0

TY 2014 Other Income Schedule**Name:** BREVILLIER VILLAGE FOUNDATION INC**EIN:** 25-1548657

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
Outreach meals	10,013		10,013
Management fees	681,117		681,117
Financial service fees	418,553		418,553
Transportation income	6,599		6,599
Beauty shop income	10,189		10,189
Telephone income	42,436		42,436
Internet income	5,664		5,664
Miscellaneous	2,222		2,222
Vending	4,118		4,118
Educational income	482		482
Wedding income	450		450
Gross Income from Special Fundraising Events	29,958		29,958

TY 2014 Other Liabilities Schedule**Name:** BREVILLIER VILLAGE FOUNDATION INC**EIN:** 25-1548657

Description	Beginning of Year - Book Value	End of Year - Book Value
Accrued payroll and payroll withholdings	643,711	641,774
Resident funds	13,390	11,420
Affiliated entities payables	2,042,886	3,869,026
Security deposit	2,800	4,350

TY 2014 Other Professional Fees Schedule

Name: BREVILLIER VILLAGE FOUNDATION INC

EIN: 25-1548657

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Other professional fees	150	0	0	150

TY 2014 Taxes Schedule**Name:** BREVILLIER VILLAGE FOUNDATION INC**EIN:** 25-1548657

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Payroll	41,718	0	0	41,718
Federal excess income tax	2,063	2,063	0	0

Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service	Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 990-PF. ▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at www.irs.gov/form990.	OMB No 1545-0047 2014
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Name of the organization BREVILLIER VILLAGE FOUNDATION INC	Employer identification number 25-1548657
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Organization type (check one)

Filers of: Form 990 or 990-EZ Form 990-PF	Section: ☐ 501(c)() (enter number) organization ☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation ☐ 527 political organization ☐ 501(c)(3) exempt private foundation ☒ 4947(a)(1) nonexempt charitable trust treated as a private foundation ☐ 501(c)(3) taxable private foundation
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Check if your organization is covered by the **General Rule** or a **Special Rule**.
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or other property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** \$5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year. ▶ \$ _____

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer “No” on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization BREVILLIER VILLAGE FOUNDATION INC	Employer identification number 25-1548657
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Part I	Contributors (see instructions) Use duplicate copies of Part I if additional space is needed		
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
<u>1</u>	Mellon Bank (Gertrude Sutton Trust) 100 State Street Suite 200 Erie, PA 16501 	\$ 22,364	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
<u>2</u>	PNC Bank (Agnes Swanson Trust) 901 State Street Erie, PA 16501 	\$ 5,907	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
<u>3</u>	Sacred Heart Ushers 716 West 26 Street Erie, PA 16508 	\$ 6,500	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
<u> </u>	 	\$ 	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
<u> </u>	 	\$ 	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
<u> </u>	 	\$ 	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)

Name of organization BREVILLIER VILLAGE FOUNDATION INC	Employer identification number 25-1548657
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Part II **Noncash Property** (see instructions) Use duplicate copies of Part II if additional space is needed

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	_____ \$	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	_____ \$	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	_____ \$	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	_____ \$	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	_____ \$	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	_____ \$	_____

Name of organization BREVILLIER VILLAGE FOUNDATION INC	Employer identification number 25-1548657
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Part III

Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of **\$1,000 or less** for the year. (Enter this information once. See instructions.) ▶ \$ _____

Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	
_____		_____	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	
_____		_____	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	
_____		_____	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	
_____		_____	