



See a Social Security Number? Say Something!
Report Privacy Problems to <https://public.resource.org/privacy>
Or call the IRS Identity Theft Hotline at 1-800-908-4490



Form 990-PF

Return of Private Foundation

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

2014

Open to Public Inspection

Department of the Treasury Internal Revenue Service

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

For calendar year 2014, or tax year beginning 07-01-2014, and ending 06-30-2015

Name of foundation: THE WESTERVELT CHARITABLE TRUST
A Employer identification number: 59-7270530
B Telephone number: (202) 664-2727
C If exemption application is pending, check here
D 1. Foreign organizations, check here
D 2. Foreign organizations meeting the 85% test, check here and attach computation
E If private foundation status was terminated under section 507(b)(1)(A), check here
F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here

Table with 5 columns: (a) Revenue and expenses per books, (b) Net investment income, (c) Adjusted net income, (d) Disbursements for charitable purposes. Rows include Contributions, Interest on savings, Dividends, Gross rents, Net gain or loss from sale of assets, Other income, Compensation of officers, directors, trustees, etc., and Total expenses and disbursements.

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

Part II Balance Sheets		Beginning of year			End of year		
		(a) Book Value	(b) Book Value	(c) Fair Market Value	(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing					
	2	Savings and temporary cash investments	40,163	40,808	40,808		
	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)	902,553 <input checked="" type="checkbox"/>	811,275	811,275		
	c	Investments—corporate bonds (attach schedule)					
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____					
	12	Investments—mortgage loans					
	13	Investments—other (attach schedule)	95,019 <input checked="" type="checkbox"/>	113,399	113,399		
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____					
15	Other assets (describe ▶ _____)						
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	1,037,735	965,482	965,482			
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	0		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.						
	24	Unrestricted	1,037,735	965,482			
	25	Temporarily restricted					
	26	Permanently restricted					
	Foundations that do not follow SFAS 117, check here <input type="checkbox"/> 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)	1,037,735	965,482				
31	Total liabilities and net assets/fund balances (see instructions)	1,037,735	965,482				

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	1,037,735
2	Enter amount from Part I, line 27a	2	-24,964
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	1,012,771
5	Decreases not included in line 2 (itemize) ▶ _____ <input checked="" type="checkbox"/>	5	47,289
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	965,482

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 PUBLICLY TRADED SECURITIES	P		
b			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 50,018		48,225	1,793
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a			1,793
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	1,793
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	43,872	978,238	0.044848
2012	32,321	899,009	0.035952
2011	45,396	837,218	0.054222
2010	32,539	813,328	0.040007
2009	28,303	753,609	0.037557

2 Total of line 1, column (d).	2	0.212586
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	0.042517
4 Enter the net value of noncharitable-use assets for 2014 from Part X, line 5.	4	1,017,379
5 Multiply line 4 by line 3.	5	43,256
6 Enter 1% of net investment income (1% of Part I, line 27b).	6	344
7 Add lines 5 and 6.	7	43,600
8 Enter qualifying distributions from Part XII, line 4.	8	67,314

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1	344
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	344
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	344
6	Credits/Payments		
a	2014 estimated tax payments and 2013 overpayment credited to 2014	6a	
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	0
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> 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	344
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	
11	Enter the amount of line 10 to be Credited to 2015 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	11	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)? <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.</i>		No
c Did the foundation file Form 1120-POL for this year?		No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation <input type="checkbox"/> \$ <u>0</u> (2) On foundation managers <input type="checkbox"/> \$ <u>0</u>		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ <u>0</u>		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>		No
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>		No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		No
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>		No
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	Yes	
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV.</i>	Yes	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> FL <input type="checkbox"/> DC _____		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation.</i>	Yes	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>		No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>		No

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address N/A	13	Yes	
14	The books are in care of THERON WESTERVELT TRUSTEE Telephone no (202) 664-2727 Located at 34 8TH STREET NE WASHINGTON DC ZIP+4 20002			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year 15			
16	At any time during calendar year 2014, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes", enter the name of the foreign country	16	Yes	No

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

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

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

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

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

Part IX-A Summary of Direct Charitable Activities

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

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

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

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	982,740
b	Average of monthly cash balances.	1b	50,132
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	1,032,872
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	1,032,872
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	15,493
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	1,017,379
6	Minimum investment return. Enter 5% of line 5.	6	50,869

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	50,869
2a	Tax on investment income for 2014 from Part VI, line 5.	2a	344
b	Income tax for 2014 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	344
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	50,525
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	50,525
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	50,525

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	67,314
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	67,314
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	344
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	66,970

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				50,525
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only.			47,865	
b Total for prior years 20___, 20___, 20___		0		
3 Excess distributions carryover, if any, to 2014				
a From 2009.				
b From 2010.				
c From 2011.				
d From 2012.				
e From 2013.				
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2014 from Part XII, line 4 ▶ \$ <u>67,314</u>				
a Applied to 2013, but not more than line 2a			47,865	
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.				19,449
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2014 <i>(If an amount appears in column (d), the same amount must be shown in column (a).)</i>	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0			
b Prior years' undistributed income Subtract line 4b from line 2b.		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 2013 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2014 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015				31,076
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions).	0			
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a	0			
10 Analysis of line 9				
a Excess from 2010.				
b Excess from 2011.				
c Excess from 2012.				
d Excess from 2013.				
e Excess from 2014.				

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

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

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

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

1 Information Regarding Foundation Managers:

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

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

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

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

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

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

c Any submission deadlines

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

Part XV **Supplementary Information** (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i> See Additional Data Table				
Total				63,000
b <i>Approved for future payment</i>				
Total				0

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
AMERICAN RED CROSS PO BOX 4002018 DES MOINES,IA 503402018	NONE	501(C)(3)	GENERAL OPERATIONS	500
CAMBRIDGE IN AMERICA PO BOX 9123 JAF BLG NEW YORK,NY 100879123	NONE	501(C)(3)	GENERAL OPERATIONS	5,000
CITY RESCUE MISSION 426 S MCDUFF AVENUE JACKSONVILLE,FL 32254	NONE	501(C)(3)	GENERAL OPERATIONS	500
DEFENDERS OF WILDLIFE 1130 SEVENTEENTH STREET NW WASHINGTON,DC 20036	NONE	501(C)(3)	GENERAL OPERATIONS	500
FRIENDS OF A1A SCENIC AND HISTORIC COASTAL BYWAY INC 2715 MIZELL ROAD ST AUGUSTINE,FL 32080	NONE	501(C)(3)	GENERAL OPERATIONS	500
FRIENDS OF FIVE WUFT-TV PO BOX 12865 GAINSVILLE,FL 32604	NONE	501(C)(3)	GENERAL OPERATIONS	300
FRIENDS OF THE GTM RESERVE INC 450 GUANA RIVER ROAD PONTE VEDRA BEACH,FL 32082	NONE	501(C)(3)	GENERAL OPERATIONS	1,000
FRIENDS OF THE LIBRARY PONTE VEDRA BEACH PO BOX 744 PONTE VEDRA BEACH,FL 320040794	NONE	501(C)(3)	GENERAL OPERATIONS	250
JACKSONVILLE HUMANE SOCIETY 8464 BEACH BOULEVARD JACKSONVILLE,FL 32216	NONE	501(C)(3)	GENERAL OPERATIONS	500
MEMBERS ASSOCIATION OF VICARS LANDING INC 1000 VICARS LANDING WAY PONTE VEDRA BEACH,FL 32082	NONE	501(C)(3)	GENERAL OPERATIONS	800
MUSCULAR DYSTROPHY ASSOCIATION 720 S COLORADO BOULEVARD 380-S DENVER,CO 80246	NONE	501(C)(3)	GENERAL OPERATIONS	2,000
N STREET VILLAGE INC 1333 N STREET NW WASHINGTON,DC 20005	NONE	501(C)(3)	GENERAL OPERATIONS	5,000
NATIONAL WILDLIFE FEDERATION 11100 WILDLIFE CENTER DRIVE RESTON,VA 201905362	NONE	501(C)(3)	GENERAL OPERATIONS	500
PHILLIPS COLLECTION 1600 21ST STREET NW WASHINGTON,DC 20009	NONE	501(C)(3)	GENERAL OPERATIONS	10,000
PLANNED PARENTHOOD 434 WEST 33RD STREET NEW YORK,NY 10001	NONE	501(C)(3)	GENERAL OPERATIONS	2,000
Total				63,000

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>				
SAMARITAN FUND COLLEGE OF VETERINARY MEDICINE UNIVERSITY OF FLORIDA PO BOX 100215 GAINSVILLE,FL 326100125	NONE	501(C)(3)	GENERAL OPERATIONS	250
WILDFLOWER DONORS INC - LADY BIRD JOHNSON WILDFLOWER CENTER 4801 LA CROSSE AVENUE AUSTIN,TX 787391702	NONE	501(C)(3)	GENERAL OPERATIONS	300
WJCT INC 100 FESTIVAL PARK AVENUE JACKSONVILLE,FL 322021397	NONE	501(C)(3)	GENERAL OPERATIONS	500
WORLD WILDLIFE FUND INC 1250 24TH STREET NW WASHINGTON,DC 20037	NONE	501(C)(3)	GENERAL OPERATIONS	500
VERMONT RURAL EDUCATION COLLABORATIVE PO BOX 234 PEACHAM,VT 05862	NONE	501(C)(3)	GENERAL OPERATIONS	10,000
WESTMINSTER COLLEGE ADVANCEMENT DEPARTMENT 1840 SOUTH 1300 EAST SALT LAKE CITY,UT 84105	NONE	501(C)(3)	GENERAL OPERATIONS	10,000
HEARBEET LIFESHARING 218 TOWN FARM ROAD HARDWICK,VT 05843	NONE	501(C)(3)	GENERAL OPERATIONS	10,000
POINTLESS THEATRE PO BOX 43033 WASHINGTON,DC 20010	NONE	501(C)(3)	GENERAL OPERATIONS	1,000
FOLGER SHAKESPEARE LIBRARY 201 EAST CAPITAL ST WASHINGTON,DC 20003	NONE	501(C)(3)	GENERAL OPERATIONS	1,000
PONTE VEDRA BEACH PARK AT LIBRARY BLVD PO BOX 472 PONTE VEDRA,FL 32082	NONE	501(C)(3)	GENERAL OPERATIONS	100
Total				63,000

TY 2014 Accounting Fees Schedule

Name: THE WESTERVELT CHARITABLE TRUST

EIN: 59-7270530

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	3,814	0		3,814

**TY 2014 Investments Corporate
Stock Schedule****Name:** THE WESTERVELT CHARITABLE TRUST**EIN:** 59-7270530

Name of Stock	End of Year Book Value	End of Year Fair Market Value
400 SHARES ABBOTT LABS	19,632	19,632
2,812 SHARES AT&T INC	99,882	99,882
250 SHARES AUTOMATIC DATA PROC	20,058	20,058
275 SHARES BCE INC	11,688	11,688
150 SHARES CHEVRON CORP	14,471	14,471
840 SHARES COCA COLA COM	32,953	32,953
300 SHARES COLGATE PALMOLIVE	19,623	19,623
200 SHARES CONSOLIDATED EDISON INC	11,576	11,576
650 SHARES ELI LILLY & CO	54,269	54,269
575 SHARES EMERSON ELEC CO	31,872	31,872
255 SHARES GENUINE PARTS CO	22,830	22,830
1,000 SHARES HALLIBURTON COMPANY	43,070	43,070
350 SHARES JOHNSON & JOHNSON COM	34,111	34,111
370 SHARES KIMBERLY CLARK CORP	39,209	39,209
825 SHARES PAYCHEX INC	38,676	38,676
365 SHARES PROCTOR & GAMBLE CO	28,558	28,558
300 SHARES ROYAL DUTCH SHELL PLC	17,205	17,205
645 SHARES SOUTHERN COMPANY	27,026	27,026
250 SHARES UNITED PARCEL SVC CL B	24,228	24,228
225 SHARES UNITED TECHS CORP COM	24,959	24,959
475 SHARES WASTE MANAGEMENT INC NEW	22,016	22,016
400 SHARES DU PONT E I DE NEMOURS	25,580	25,580
240 SHARES EXXON MOBIL CORP	19,968	19,968
375 AMERICAN WTR WKS CO INC	18,236	18,236
375 CENTURYLINK INC	11,018	11,018
290 SHARES KLA TENCOR CORP	16,301	16,301
570 SHARES PFIZER INC	19,112	19,112
225 SHARES VENTAS INC	13,970	13,970
225 SHARES WAL-MART STORES INC	15,959	15,959
400 SHARES ABBVIE INC	26,876	26,876

Name of Stock	End of Year Book Value	End of Year Fair Market Value
83 SHARES CDK GLOBAL INC	4,480	4,480
46 SHARES HALYARD HELATH INC	1,863	1,863

TY 2014 Investments - Other Schedule**Name:** THE WESTERVELT CHARITABLE TRUST**EIN:** 59-7270530

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
200 SHARES ISHARES BARCLAYS TIPS	FMV	22,410	22,410
5,099 SHARES NUVEEN INS MUNI OPPTY	FMV	69,397	69,397
400 SHARES VANGUARD MSCI EUROPEAN	FMV	21,592	21,592

TY 2014 Other Decreases Schedule**Name:** THE WESTERVELT CHARITABLE TRUST**EIN:** 59-7270530

Description	Amount
NET UNREALIZED GAINS ON INVESTMENTS	47,289

TY 2014 Other Income Schedule

Name: THE WESTERVELT CHARITABLE TRUST

EIN: 59-7270530

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
TAX REFUND	144		144

TY 2014 Taxes Schedule

Name: THE WESTERVELT CHARITABLE TRUST

EIN: 59-7270530

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN DIVIDEND TAX	89	89		0