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## Form **990-PF**

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

OMB No 1545-0052

2014

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 separate instructions is at www.irs.gov/form990pf.

Open to Public Inspection

For cale	endår year 2014, or tax year beginning 1	0/01 , 2014,	and ending 9/		
					mber
	NNE & DAVID JACKSON FOUNDATION		<u> </u>	22-6821580	
	MAIL BOX 7998 (PO BOX 523882	)	E	Telephone number (see ins 908-273-3670	tructions)
MLAM	I, FL 33152		<u> </u>	300-213 3010	
			c	If exemption application is	pending, check here 🟲
G Che	ck all that apply Initial return	Initial return of a form	ner public charity		
G Che	Final return	Amended return	ner public charity	1 Foreign organizations, che	ck nere
	Address change	Name change		2 Foreign organizations mee	ting the 85% test, check
II Cha		(c)(3) exempt private f	oundation	here and attach computation	on • L
n Cite	eck type of organization: Section 501 Section 4947(a)(1) nonexempt charitable to			If private foundation status	s was terminated
				under section 507(b)(1)(A)	
	100	-	L		
( <i>non</i>	I 🖵	Other (specify)  column (d) must be or	Cash hasis	If the foundation is in a 60 under section 507(b)(1)(B	
Part I	1,292,175. (Part I, Analysis of Revenue and		·- · · · · · · · · · · · · · · · · · ·	1	1
Parti	Expenses (The total of amounts in	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net	(d) Disbursements for charitable
	columns (b), (c), and (d) may not neces	exherises her books	income	lileome	purposes
	sarily equal the amounts in column (a)				(cash basis only)
<del></del>	(see instructions))		<u> </u>	<u> </u>	
	Contributions, gifts, grants, etc, received (attach schedule)     Ck    X if the foundn is not required to attach Sch B	**			- **
	2 Ck ► X if the foundn is not required to attach Sch B	r488 # 3	** ** ** ** ** ** ** ** ** ** ** ** **		
	3 Interest on savings and temporary cash investments				1 24 1 /
	4 Dividends and interest from securities	26,681.	26,681	. 26,681.	in the second se
	5 a Gross rents				* ****
	Net rental income or (loss)	À			* C * C * C * C * C * C * C * C * C * C
R	6 a Net gain or (loss) from sale of assets not on line 10	15,136.	``. ` <b>`</b>	· · · · · · · · · · · · · · · · · · ·	
E	b Gross sales price for all assets on line 6a 78,517.	<u> </u>	13111		KECEINED !
Ě	7 Capital gain net income (from Part IV, line 2)		15,136		, ,
N	8 Net short-term capital gain	% 6	1334 <b>%</b>	121	DEC 3 1 2015
U E	9 Income modifications 10 a Gross sales less		[ ·	1.7	DEO -
_	returns and allowances			"  "   "   "   T   L	CODEN LIT
	<b>b</b> Less Cost of			. K. 2 MY 3 MA 3 M.	OGULNIUL
	goods sold. C Gross profit or (loss) (attach schedule).	*	* 1 * 4 * * * * * * * * * * * * * * * *	<u>                                     </u>	
	11 Other income (attach schedule)	<del></del> ,	* ## ·		1
	,				
	12 Total. Add lines 1 through 11	41,817.	41,817	. 26,681.	
	13 Compensation of officers, directors, trustees, etc	0.			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
А	16 a Legal fees (attach schedule)				
D M	<b>b</b> Accounting fees (attach sch) SEE ST 1	2,355.	2,355	. 2,355.	
i N	c Other prof fees (attach sch)				
O Î	17 Interest				
E CO	18 Taxes (attach schedule)(see instrs) SEE STM 2	1,076.	638		
à <b>5</b> 2	19 Depreciation (attach				
	sch) and depletion  20 Occupancy		<del></del>		1
G Z	21 Travel, conferences, and meetings			<del></del>	
A III	22 Printing and publications.	<u> </u>			
N SX	23 Other expenses (attach schedule)	<del></del>	<del></del> -		
H	SEE STATEMENT 3	211.	211	. 211.	
NEW JENEO 8	24 Total operating and administrative				
ఉ	expenses. Add lines 13 through 23 25 Contributions, gifts, grants paid STMT 4	3,642.	3,204	. 2,566.	74.55
		74,000.		<del>-</del>	74,000.
~	26 Total expenses and disbursements. Add lines 24 and 25	77,642.	3,204	. 2,566.	74,000.
2016	27 Subtract line 26 from line 12:	11,042.	3,204	2,300.	74,000.
رن,	a Excess of revenue over expenses				
	and disbursements	-35,825.			
	<b>b</b> Net investment income (if negative, enter -0-)		38,613		
	C Adjusted net income (if negative, enter -0-)			24,115.	

Parl	t II	Balance Sheets column should be for end-of-year amounts only	Seginning or year		1 (a) F = 1 M = 1 = 1 Y   1
		(See instructions )	(a) Book Value	(b) Book Value	(c) Fair Market Value
		Cash – non-interest-bearing	2,213.	29,153.	29,153.
•		,Savings and temporary cash investments			
	3	Accounts receivable		an the appropriate to a real transformation of the	
	، ا	Less allowance for doubtful accounts			
	4	Pledges receivable  Less allowance for doubtful accounts			
	5	Grants receivable		<del></del>	<del> </del>
				<del></del>	<del>                                     </del>
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach sch)			
A		Less: allowance for doubtful accounts ▶			
S	8	Inventories for sale or use	<del></del>		<u> </u>
A S S E T	9	Prepaid expenses and deferred charges	······································		<del> </del>
S	10 a	Investments – U.S and state government			
_		obligations (attach schedule)			
	t	Investments — corporate stock (attach schedule)	1,451,327.	1,263,022.	1,263,022.
	(	: 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)			
	14	Land, buildings, and equipment. basis ►			, , , , , , , , , , , , , , , , , , , ,
		Less: accumulated depreciation (attach schedule)			
		Other assets (describe >)			
	16	Total assets (to be completed by all filers — see the instructions Also, see page 1, item l).	1,453,540.	1,292,175.	1,292,175.
L	17	Accounts payable and accrued expenses			<u> </u>
À	18	Grants payable			4
В	19	Deferred revenue		······································	<b>.</b>
Ļ	20	Loans from officers, directors, trustees, & other disqualified persons			
÷	21	Mortgages and other notes payable (attach schedule)			
Ī	22	Other liabilities (describe)			-
E S	23	Total liabilities (add lines 17 through 22)	0.	0.	
		Foundations that follow SFAS 117, check here X and complete lines 24 through 26 and lines 30 and 31.		<del>-</del>	
NF	24	Unrestricted	1,453,540.	1,292,175.	***
E U	25	Temporarily restricted		<u> </u>	]
ח	26	Permanently restricted			
A B S A L T A		Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.			
ĔL	27	Capital stock, trust principal, or current funds			
SN	28	Paid-in or capital surplus, or land, bldg, and equipment fund			]
οE	29	Retained earnings, accumulated income, endowment, or other funds			
RS	30	Total net assets or fund balances (see instructions)	1,453,540.	1,292,175.	
	31	Total liabilities and net assets/fund balances (see instructions)	1,453,540.	1,292,175.	1
Par	<u> </u> 	Analysis of Changes in Net Assets or Fund Balance		1,232,173.	
					T
1	end-	I net assets or fund balances at beginning of year — Part II, colu of-year figure reported on prior year's return).	ımırı (a), iirle 30 (must aç	gree with 1	1,453,540.
2		r amount from Part I, line 27a		2	-35,825.
3		increases not included in line 2 (itemize)		3	1 20,020.
4	Add	lines 1, 2, and 3		4	1,417,715.
5	Decre	ases not included in line 2 (itemize) SEE STATEMENT	5	5	125,540.
6	Tota	I net assets or fund balances at end of year (line 4 minus line 5)		ine 30 <b>6</b>	1,292,175.

Par	(a) List and describe	the kind(s) of property sold (e g ,	real estate.	(b) How acc	uired	(C) Date acquired	(d) Date sold
		e, or common stock, 200 shares M	LC Company) 	D — Dona		(month, day, year)	(month, day, year)
	SCHEDULE ATTACHED		· ·	P		VARIOUS	_VARIOUS_
						<del>-</del>	
			····		$\dashv$	<u> </u>	<del>-</del>
	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other ba plus expense of sa			(h) Gain or (e) plus (f) m	
	78,517.		6	3,381.			15,136.
·				3,332.			10,100.
	:						
	d						
			<del></del>				
	(i) Fair Market Value as of 12/31/69	ing gain in column (h) and owned l (j) Adjusted basis as of 12/31/69	(k) Excess of column over column (j), if a	1 (1)		(I) Gains (Coli in minus column (k n -0-) <b>or</b> Losses (fr	), but not less
- 7	3						15,136.
t	<del> </del>						
							<u>-</u>
	•		. 5 7				
	Capital gain net income or (ne	t capital loss)If (loss), en	enter in Part I, line 7 ter -0- in Part I, line 7	-	2		15,136.
3	Net short-term capital gain or (	(loss) as defined in sections 1222(5	i) and (6)				
	If gain, also enter in Part I, line in Part I, line 8	e 8, column (c) (see instructions) 1	f (loss), enter -0-	-	3		0.
Pai		Section 4940(e) for Reduce			me		
(For	optional use by domestic private for	oundations subject to the section 4940	(a) tax on net investment inc	come )		N/A	
If se	ction 4940(d)(2) applies, leave t	his part blank					
					2		□ N-
		ction 4942 tax on the distributable a dify under section 4940(e) Do not o		ase periou	,	Yes	∐ No
<del></del>	<del> </del>	each column for each year, see the in		entries		<del> </del>	
	(a)	(b)	(c)	T		(d)	
	Base period years Calendar year (or tax year beginning in)	Adjusted qualifying distributions	Net value of noncharitable-use as	sets	(colui	Distribution mn (b) divided	
	2013						
	2012						
	2011						
	2010						
	2009						
2	Total of line 1, column (d).				2		
3	• • • • • • • • • • • • • • • • • • • •	on E waar hasa pariad duuda tha	total an line 2 by E. ar by t	L. H			<del></del>
3	number of years the foundation	ne 5-year base period — divide the n has been in existence if less than	5 years	ne _	3		
4	Enter the net value of nonchar	itable-use assets for 2014 from Par	t X, line 5		4		
5	Multiply line 4 by line 3				5		
6	Enter 1% of net investment inc	come (1% of Part I, line 27b)			6		
7	Add lines 5 and 6				7		
8	Enter qualifying distributions fr	om Part XII, line 4			8		
	If line 8 is equal to or greater that Part VI instructions	n line 7, check the box in Part VI, line	1b, and complete that part i	using a 1%	tax ra	te See the	

Form 9		22-68215 <u>8</u>		P	age 4
Part		see instruct	ions)		
	empt operating foundations described in section 4940(d)(2), check here				
	ate of ruling or determination letter. (attach copy of letter if necessary – see instrs)			_	
-	omestic foundations that meet the section 4940(e) requirements in Part V,	• •   1			<u> 172.</u>
	heck here. I and enter 1% of Part I, line 27b				
c A	Il other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, column (b)				
	ax under section 511 (domestic section 4947(a)(1) trusts and taxable	2			0
	oundations only Others enter -0-).	3			<u>0.</u> 772.
-	udd lines 1 and 2 ubtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0				0.
	ax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-	5 5			<del>772.</del>
	redits/Payments:	-			112.
	2014 estimated tax pmts and 2013 overpayment credited to 2014				
	Exempt foreign organizations — tax withheld at source	-			
	fax paid with application for extension of time to file (Form 8868)	<del></del>			
	ackup withholding erroneously withheld 6d				
	otal credits and payments Add lines 6a through 6d	7			0.
	Inter any <b>penalty</b> for underpayment of estimated tax. Check here  If Form 2220 is attached	8			
	ax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	▶ 9	_	-	772.
	expayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	<b>►</b> 10			
	nter the amount of line 10 to be Credited to 2015 estimated tax	<b>&gt;</b> 11			-
	VII-A Statements Regarding Activities				
	ouring the tax year, did the foundation attempt to influence any national, state, or local legislation or did	ıt	1	Yes	No
	articipate or intervene in any political campaign?		1 a		Х
b [	old it spend more than \$100 during the year (either directly or indirectly) for political purposes				
(	see Instructions for the definition)?		1 b	~~~	X
	f the answer is 'Yes' to <b>1a</b> or <b>1b</b> , attach a detailed description of the activities and copies of any materials published			7% A 3 &	* .
	or distributed by the foundation in connection with the activities				111
C (	old the foundation file <b>Form 1120-POL</b> for this year?  Inter the amount (if any) of tax on political expenditures (section 4955) imposed during the year		1 c	79.8	X
	1) On the foundation   \$\begin{align*} \text{\$ \text{\$ 0. (2) On foundation managers.}} \end{align*}	(	o.l 🦼		, i
e i	inter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on			4(,,	<b>(</b> † 4
	oundation managers ►\$ <u>0.</u>		البنيا		شأت
	las the foundation engaged in any activities that have not previously been reported to the IRS?		2		X
	f 'Yes,' attach a detailed description of the activities				
3	las the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles				<u> </u>
	if incorporation, or bylaws, or other similar instruments? If 'Yes,' attach a conformed copy of the change	25	3		X
	old the foundation have unrelated business gross income of \$1,000 or more during the year?		4 a		X
	f 'Yes,' has it filed a tax return on <b>Form 990-T</b> for this year?		5	IN	/A
	Vas there a liquidation, termination, dissolution, or substantial contraction during the year?		<u> </u>		X
	f 'Yes,' attach the statement required by General Instruction T				<b>1</b>
	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 confl with the state law remain in the governing instrument?	ıct	6	<del>-</del> -	X
	old the foundation have at least \$5,000 in assets at any time during the year? If 'Yes,' complete Part II, column (c), and Part XV		7	Х	
	Enter the states to which the foundation reports or with which it is registered (see instructions)	<b>•</b>		<u> </u>	
	N/A				
-	f the answer is 'Yes' to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General				
Ü	or designate) of each state as required by General Instruction G? If 'No,' attach explanation		8 b	Х	
_	s the foundation claiming status as a private operating foundation within the meaning of section 4942(j) or calendar year 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)? If 'Yes,' cor	(3) or 4942(ı)(	(5)		
9	and and an user 2014 as the toyoble year heginning in 2014 (see instructions for Part VIVA2 If 'Ves' cor	nnlete Part X	ΪÝ   9		Х
9	or calendar year 2014 or the taxable year beginning in 2014 (see institutions for Fart XIV). If Yes, cor	inpicto i ait is	·⊢		
	or calendar year 2014 or the taxable year beginning in 2014 (see instructions for Part XIV). If Pes, cor Old any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their name		10		

Par	t VII-A	Statements Regarding Activities (continued)		_			
11	At any ti within th	me during the year, did the foundation, directly or indirectly, own a controlled entity e meaning of section 512(b)(13)? If 'Yes', attach schedule (see instructions)			11		X
	advisory	oundation make a distribution to a donor advised fund over which the foundation or a disqualified pers privileges? If 'Yes,' attach statement (see instructions)			12		x
13	Did the f	oundation comply with the public inspection requirements for its annual returns and exemption	n applica	ition?	13	X	
	Website	address N/A		9	88_	02	26
14	The bool	ks are in care of DAVID B JACKSON Telephon	e no 🟲	908-5		<u> </u>	. <b></b> .
	Located		331	<u>52</u>	~ <del>-</del>		
15		4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — Check here		1	N/A	•	Ц
	and ente	er the amount of tax-exempt interest received or accrued during the year	<b>^</b> [_	15			N/A
16	At any tir bank, se	ne during calendar year 2014, did the foundation have an interest in or a signature or other authority curities, or other financial account in a foreign country?	over a		16	Yes	No X
		instructions for exceptions and filing requirements for FinCEN Form 114, (formerly TD F 90-22) name of the foreign country	2 1) If 'Y	es,'			
Pai	t VII-B	Statements Regarding Activities for Which Form 4720 May Be Required					
		n 4720 if any item is checked in the 'Yes' column, unless an exception applies.				Yes	No
1 a	a During th	ne year did the foundation (either directly or indirectly)		_			li
	(1) Enga	age in the sale or exchange, or leasing of property with a disqualified person?	Yes	X No	»,	,	
	(2) Borre	ow money from, lend money to, or otherwise extend credit to (or accept it from) a ualified person?	Yes	X No		编	, j
	(3) Furn	ish goods, services, or facilities to (or accept them from) a disqualified person?	Yes	X No	.4	À	3
	(4) Pay	compensation to, or pay or reimburse the expenses of, a disqualified person?	Yes	X No	'	•	ľ
	(5) Tran for the	sfer any income or assets to a disqualified person (or make any of either available he benefit or use of a disqualified person)?	Yes	XNo	4		
	(6) Agre found of go	be to pay money or property to a government official? ( <b>Exception.</b> Check 'No' if the dation agreed to make a grant to or to employ the official for a period after termination overnment service, if terminating within 90 days)	Yes	XNo	N	4	
ı		nswer is 'Yes' to 1a(1)-(6), did <b>any</b> of the acts fail to qualify under the exceptions described in ons section 53 4941(d)-3 or in a current notice regarding disaster assistance (see instructions	)?		<u>&amp;</u> 1 b	N	-\$\$  /A
	Organiza	ations relying on a current notice regarding disaster assistance check here	•	· [_]	<b>%</b>	<b>5</b> <sub>8</sub>	* 1
(	c Did the f that were	foundation engage in a prior year in any of the acts described in 1a, other than excepted acts e not corrected before the first day of the tax year beginning in 2014?	i		1 c		X
2	Taxes or private of	n failure to distribute income (section 4942) (does not apply for years the foundation was a operating foundation defined in section 4942(j)(3) or 4942(j)(5)).			<b>*</b>	s. «	
í	At the er	nd of tax year 2014, did the foundation have any undistributed income (lines 6d Part XIII) for tax year(s) beginning before 2014?	Yes	XNo	. * * . '		
		list the years ► 20 , 20 , 20 , 20					*
ı	<b>b</b> Are there	e any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4942 to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942	2(a)(2) (a)(2) to				
		s listed, answer 'No' and attach statement — see instructions ).	(-/(-/		2 b	N	/A
(	c If the pro	ovisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years	here				
	▶ 20	_ , 20 , 20 , 20					7
3 :	Did the fenterpris	foundation hold more than a 2% direct or indirect interest in any business se at any time during the year?	Yes	X No	:		4
I	or disqui by the C	did it have excess business holdings in 2014 as a result of (1) any purchase by the foundation alified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approve formmissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or appea of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to the foundation had excess business holdings in 2014)	ed	_	3 b		/A
4		foundation invest during the year any amount in a manner that would jeopardize its le purposes?			4 a		Х
ı	<b>b</b> Did the f	foundation make any investment in a prior year (but after December 31, 1969) that could					i i
	jeopardiz	te its charitable purpose that had not been removed from jeopardy before the first day of year beginning in 2014?			4 b	:	X
BAA		<u> </u>		Fo	orm <b>99</b> 0	PF (	

Fart VIII-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?   (3) Provide a grant to an individual for travel, study, or other similar purposes?   Yes   No (3) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(e)(A)? (see instructions)   Yes   No (4) Provide for any purpose other than religious, chantable, scientific, literary, or educational purposes, or for the prevention of cruelly to children or animals?   Yes   No (5) Provide for any purpose other than religious, chantable, scientific, literary, or educational purposes, or for the prevention of cruelly to children or animals?   Yes   No (5) Provide for any purpose other than religious, chantable, scientific, literary, or educational purposes, or for the prevention of cruelly to children or animals?   Yes   No (5) If any answer is Yes' to 53-5(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)?   Organizations of the foundation of the statement required by Regulations section 53 4945-5(d)   Organizations are children or animals?   N/A   Yes   No   If Yes, 'attach the statement required by Regulations section 53 4945-5(d)   Organizations are children or a personal benefit contract?   Yes   No   If Yes' to 6b, the Form 8870   Yes   No   If Yes' to 6b, the Form 8870   Yes   No   If Yes' to 6b, the Form 8870   Yes   No   If Yes' to 6b, the Form 8870   Yes   No   If Yes' to 6b, the Form 8870   Yes   No   If Yes' to 6b, the Form 8870   Yes   No   If Yes' to 6b, the Form 8870   Yes   No   If Yes' to 6b, the Form 8870   Yes   Yes   Yes	orm 990-PF (2014) SUZANNE & DAVID	JACKSON FOUNDATI	ON	22-682	21580	Page
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?  (2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly, any voter registration drive?  (3) Provide a grant to an individual for travel, study, or other similar purposes?  (4) Provide a grant to an individual for travel, study, or other similar purposes?  (5) Provide for any purpose other than religious, charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions)  (6) Provide for any purpose other than religious, charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions)  (7) Provide for any purpose other than religious, charitable, etc., organization described in section 54945 or in a current oricle tregarding disaster assistance (see instructions)?  (8) Provide for any purpose other than religious, charitable, etc., organization described in Regulations, section 53 4945 or in a current notice regarding disaster assistance (see instructions)?  (9) Provide for any purpose other than religious, charitable, etc., organization described in Regulations section 53 4945 or in a current notice regarding disaster assistance (see instructions)?  (9) Organizations religion a current notice regarding disaster assistance check here  (1) If yes, statch the statement required by Regulations section 53 4945-5(d)  (1) Yes (1) Other than the statement required by Regulations section 53 4945-5(d)  (2) Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  (2) Did the foundation, during the year, pay premiums, directly or indirectly, to pay premiums on a personal benefit contract?  (3) A lany time during the tax year, was the foundation a party to a prohibited tax shelter transaction?  (9) Tax time during the tax year, was the foundation and provided that the structure of the foundation receive any proceeds or have any net income attributable to the transaction?  (1) Ta	art VII-B Statements Regarding Acti	vities for Which Form	1 4720 May Be Req	uired (continued)		
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(4) Provide a grant to an organization other than a charitable, etc, organization described in section 4945(d)(4)(A)? (see instructions)  (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?  (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)?  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?  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?  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?  If Yes' did the foundation receive any proceeds or have any net income attributable to the transaction?  Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors  List all officers, directors, trustees, foundation managers and their compensation (G) C	(2) Influence the outcome of any specific on, directly or indirectly, any voter reg	public election (see section istration drive?	1 4955), or to carry		No	
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described in Regulations section 53 4945 or in a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance check here  clif the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?  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?  b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  b Did the foundation during the year, pay premiums, directly or indirectly, on a personal benefit contract?  Test ob. file Form 8870  At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?  Yes X No  6 b  11 Yes' to 6b, file Form 8870  Test ob. file Form 8870  N/A 7b  The Manufactions of file highest-paid employees (b) Title, and average hours per week devoled for position for the party of the	(5) Provide for any purpose other than rel educational purposes, or for the preve	igious, charitable, scientific ntion of cruelty to children	c, literary, or or animals?	Yes X	No	
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6 a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  7 a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?  7 a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?  7 b If Yes, did the foundation receive any proceeds or have any net income attributable to the transaction?  N/A  7 b  7 b  7 b  7 b  7 b  7 b  7 b  7	c If the answer is 'Yes' to question 5a(4), do tax because it maintained expenditure res	oes the foundation claim ex ponsibility for the grant?	emption from the	N/A Yes	No	
on a personal benefit contract?  b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  7 a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?  7 a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?  7 a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?  7 b If 'Yes,' did the foundation receive any proceeds or have any net income attributable to the transaction?  N/A  7 b 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).  (b) Title, and average hours per week devoted to position  (c) Compensation  (d) Contributions to employee benefit plans and deferred compensation  (e) Expense other all plans and deferred compensation  (find paid, enter -0-)  THE MATLBOX 7998 (PO BOX 52388  MIAMI, FL 33152  SUZANNE F. JACKSON  TRUSTEE  0.  0.  10.  10.  10.  10.  10.  10.	If 'Yes,' attach the statement required by t	Regulations section 53 494	5-5(d)		•	
If 'Yes' to 6b, file Form 8870  7 a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? Yes X No b if 'Yes,' did the foundation receive any proceeds or have any net income attributable to the transaction? N/A 7b Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors  1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).  (a) Name and address (b) Title, and average devoted to position (if not paid, enter -0-) (c) Compensation (d) Contributions to employee benefit plans and deferred compensation  TRUSTEE 0. 0. 0.  TRUSTEE 0. 0.  TRUSTEE 0. 0.  O.  UNAMIT, FL 33152  SUZANNE F. JACKSON TRUSTEE 0. 0.  SUMMIT, NJ 07901  DAVID B JACKSON, JR. TRUSTEE 0. 0. 0.  LORI R. JACKSON, JR. TRUSTEE 0. 0. 0.  O.  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 hosition of the ralls and deferred compensation (d) Contributions to employee benefit plans and deferred compensation (d) Contributions to employee benefit plans and deferred compensation (d) Contributions to employee benefit plans and deferred compensation (d) Contributions to employee benefit plans and deferred compensation (d) Contributions to employee benefit plans and deferred compensation (d) Contributions to employee benefit plans and deferred compensation (d) Contributions to employee benefit plans and deferred compensation (d) Contributions to employee benefit plans and deferred compensation (d) Contributions to employee benefit plans and deferred compensation (d) Contributions to employee benefit plans and deferred compensation (d) Contributions to employee contributions to employee benefit plans and deferred compensation (d) Contributions to employee to the ralls plans and deferred compensation (d) Contributions to employee to the ralls plans and deferred compensation (d) Contributions to	on a personal benefit contract?			∐ Yes [X]		***************
Ta At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?    Yes   No   7   7	<b>b</b> Did the foundation, during the year, pay p	remiums, directly or indirec	tly, on a personal bene	fit contract?	6 Ь	X
bif 'Yes,' did the foundation receive any proceeds or have any net income attributable to the transaction? N/A 7b Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors  1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).  (a) Name and address  (b) Title, and average hours per week devoted to position  (fi not paid, enter -0-)  (lf not paid,	•					
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  (f) rot paid, enter -0-)  (f) rot paid, enter -0-)  (g) Romensation  (h) Title, and average hours per week devoted to position  (f) rot paid, enter -0-)  (g) Romensation  (h) Title, and average hours per week devoted to position  (h) Title, and average hours per week devoted to position  (h) Title, and average hours per week devoted to position  (h) Title, and average hours per week devoted to position  (h) Title, and average hours per week devoted to position  (h) Title, and average hours per week devoted to position  (h) Title, and average hours per week devoted to position  (h) Title, and average hours per week devoted to position  (h) Title, and average hours per week devoted to position  (h) Title, and average hours per week devoted to position  (h) Compensation  (h) Contributions to employee benefit plans and deferred compensation  (h) Compensation  (h) Title, and average hours per week devoted to position  (h) Title, and average hours per week devoted to position  (h) Compensation  (h) Contributions to employee other than those included on line 1 – see instructions). If none, enter 'NONE.'						. ــــــــــــــــــــــــــــــــــــ
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  (f) not paid, enter -0-)  (f) not paid, enter -0-)  (g) Compensation  (h) Contributions to employee benefit plans and deferred compensation  (h) Contributions to employee benefit plans and deferred compensation  (h) Contributions to employee benefit plans and deferred compensation  (h) Contributions to employee benefit plans and deferred compensation  (h) Contributions to employee position  (h) Contributions to employee position  (h) Contributions to employee position  (h) Contributions to employee to the rate of the all to the plans and deferred compensation  (h) Contributions to employee to the rate of the all to the plans and deferred compensation  (h) Contributions to employee benefit plans and deferred compensation  (h) Contributions to employee benefit plans and deferred compensation  (h) Contributions to employee benefit plans and deferred compensation  (h) Contributions to employee benefit plans and deferred compensation					1/ 44	
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(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 other all to employee benefit plans and deferred compensation  TRUSTEE  0.  0.  0.  1.  1.  1.  1.  1.  1.  1.		lation managers and their	compensation (see inst			
hours per week devoted to position   Compensation	T List all officers, all octors, trastoos, round				(e) Expens	e account,
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MIAMI, FL 33152  SUZANNE F. JACKSON  TRUSTEE  O.  O.  SUMMIT, NJ 07901  DAVID B JACKSON, JR.  TRUSTEE  O.  O.  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 other allowed to position	DAVID B JACKSON	TRUSTEE	0.	0.		0
SUZANNE F. JACKSON TRUSTEE 0. 0. 10 SUMMIT, NJ 07901  DAVID B JACKSON, JR. TRUSTEE 0. 0. 0. 0. 0. 0. 0. 0. 0. 0. 0. 0. 0.		8 0				
SUMMIT, NJ 07901  DAVID B JACKSON, JR.  TRUSTEE  O  TRUSTEE  O  TRUSTEE  O  O  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		TRUSTEE	0.	0.		0
DAVID B JACKSON, JR.  TRUSTEE  O  LORI R. JACKSON  TRUSTEE  O  TRUSTEE  O  O  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		0				
LORI R. JACKSON  TRUSTEE  O  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	DAVID B JACKSON, JR.	TRUSTEE	0.	0.		0
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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 (e) Expense other allowed the plans and deferred compensation	LORI R. JACKSON		0.	0.		0
(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		"				
(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	2 Compensation of five highest-paid employee	s (other than those included	on line 1 – see instructio	ns). If none, enter 'NONE,		
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	paid more than \$50,000	hours per week	(*)	employee benefit plans and deferred	other al	llowances
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Total number of other employees paid over \$50,000  TEFA0306L 06/17/14  Form 990-F	otal number of other employees paid over \$50	0,000		<u></u>	<u> </u>	0

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
N/A	
2	
All other program-related investments. See instructions	
3	
Total. Add lines 1 through 3	<b>•</b>

Form 990-PF (2014)

BAA

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	1 a	1,357,175.
<b>b</b> Average of monthly cash balances	1 b	15,683.
c Fair market value of all other assets (see instructions)	1 c	
d Total (add lines 1a, b, and c)	1 d	1,372,858.
e Reduction claimed for blockage or other factors reported on lines 1a and 1c		
(attach detailed explanation)	0.	
2 Acquisition indebtedness applicable to line 1 assets	2	0.
3 Subtract line 2 from line 1d	3	1,372,858.
4 Cash deemed held for charitable activities Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	20,593.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	1,352,265.
6 Minimum investment return. Enter 5% of line 5	6	67,613.
Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private		undations
and certain foreign organizations check here ▶ ☐ and do not complete this p	art.)	
1 Minimum investment return from Part X, line 6	1	67,613.
2 a Tax on investment income for 2014 from Part VI, line 5	772.	
b Income tax for 2014 (This does not include the tax from Part VI)		
c Add lines 2a and 2b	2 c	772.
3 Distributable amount before adjustments Subtract line 2c from line 1	3	66,841.
4 Recoveries of amounts treated as qualifying distributions	4	
5 Add lines 3 and 4	5	<u>6</u> 6,841.
6 Deduction from distributable amount (see instructions)	6	
7 Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	66,841.
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	1 a	74,000.
<b>b</b> Program-related investments — total from Part IX-B	1 b	
2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc, purposes	. 2	
	*13	
3 Amounts set aside for specific charitable projects that satisfy the a Suitability test (prior IRS approval required)	3 a	
<b>b</b> Cash distribution test (attach the required schedule)	3 b	
4 Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line	4 4	74,000.
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	
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6	74,000.
Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether qualifies for the section 4940(e) reduction of tax in those years	the foundation	
BAA		Form <b>990-PF</b> (2014)

Part XIII Undistributed Income (see instructions)

	<b>(a)</b> Corpus	<b>(b)</b> Years prior to 2013	<b>(c)</b> 2013	<b>(d)</b> 2014
1 Distributable amount for 2014 from Part XI,				66,841.
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only			26,713.	
<b>b</b> Total for prior years. 20 , 20 , 20		0.		
3 Excess distributions carryover, if any, to 2014:			,, ···	
a From 2009				
<b>b</b> From 2010				
c From 2011				
<b>d</b> From 2012				
e From 2013				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2014 from Part	,	\$	;	
XII, line 4 <sup>.</sup> ► \$ 74,000.				
a Applied to 2013, but not more than line 2a	, 43	, 2	26,713.	· , ,
<b>b</b> Applied to undistributed income of prior years	,			
(Election required – see instructions)  c Treated as distributions out of corpus	*** / **	0.	<u>, 495 * %</u>	<b>*</b> * * * * * * * * * * * * * * * * * *
(Election required — see instructions)	0.	*		\$. \$.
d Applied to 2014 distributable amount	* * * * * * * * * * * * * * * * * * *	* * * * * * * * * * * * * * * * * * * *	*	47,287.
e Remaining amount distributed out of corpus	0.	* 1	: A A	., **
5 Excess distributions carryover applied to 2014	0.	***	1 11 14	0.
(If an amount appears in column (d), the same amount must be shown in column (a) )	1, ,	y		2 6 3
same amount must be shown in column (a) )	/:j / * <b>* * * *</b> *			<b> </b> • • • • • • • • • • • • • • • • • • •
6 Enter the net total of each column as	*	}	¢ }	, , , , , ,
indicated below:		* .		*
a Corpus Add lines 3f, 4c, and 4e. Subtract line 5	0.	à ŝ	· .;	
<b>b</b> Prior years' undistributed income Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed	1 4			
income for which a notice of deficiency has	***			
been issued, or on which the section 4942(a) tax has been previously assessed	.1 %.	0.		<u> </u>
, ,	73 7	<u> </u>	***	, , ,
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				19,554.
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	<u> </u>			
a Excess from 2010				!
b Excess from 2011				;
c Excess from 2012				:
d Excess from 2013				
e Excess from 2014				;
		L		

Form 990-PF (2014) SUZANNE & DAVID			·····	22-6821580	Page <b>10</b>
Part XIV   Private Operating Foundat					<u>N/A</u>
1a If the foundation has received a ruling or dete is effective for 2014, enter the date of the	ruling			^[	4042(1)(E)
<b>b</b> Check box to indicate whether the foundat		erating foundation of		4942(j)(3) or	4942(j)(5)
2a Enter the lesser of the adjusted net income from Part I or the minimum	Tax year (a) 2014	<b>(b)</b> 2013	Prior 3 years (c) 2012	(d) 2011	(e) Total
investment return from Part X for each year listed	(a) 2014	(b) 2013	(c) 2012	(u) 2011	(5) 10(2)
<b>b</b> 85% of line 2a		<u> </u>			
c Qualifying distributions from Part XII, line 4 for each year listed					<u> </u>
d Amounts included in line 2c not used directly for active conduct of exempt activities					<u>-</u>
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					
<ol> <li>Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)</li> </ol>					
(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					
Rart XV Supplementary Information assets at any time during th	(Complete this e vear – see ir	part only if the structions.)	foundation had	\$5,000 or more i	in
Information Regarding Foundation Managers of the foundation who have close of any tax year (but only if they have NONE	jers:	han 2% of the total co	ontributions received section 507(d)(2))	by the foundation before	re the
<b>b</b> List any managers of the foundation who own	10% or more of the	stock of a corporation	on (or an equally large	portion of the owners	hip of
a partnership or other entity) of which the NONE	foundation has a 1	0% or greater inter	est		
2 Information Regarding Contribution, Gran Check here ☐ If the foundation only ma requests for funds If the foundation make complete items 2a, b, c, and d	kes contributions to s gifts, grants, etc	preselected charitable (see instructions) to	le organizations and o o individuals or orga	nizations under othei	
a The name, address, and telephone number of	e-mail address of t	the person to whom a	pplications should be	addressed	
SEE STATEMENT 6					
b The form in which applications should be:	submitted and info	rmation and materia	als they should inclu	de.	
			-		
c Any submission deadlines	····		· · · · · · · · · · · · · · · · · · ·		·
SEE STATEMENT FOR LINE 2A					
d Any restrictions or limitations on awards,	such as by geograp	phical areas, charita	ible fields, kinds of i	nstitutions, or other f	actors
SEE STATEMENT FOR LINE 2A	<del></del>			<u> </u>	

BAA

3 Grants and Contributions Paid During the Y	ear or Approved for Fut	ure Paymen	t	·
Recipient		Foundation status of recipient		Amount
Name and address (home or business)	substantial contributor	recipient		
Name and address (home or business)  a Paid during the year	substantial contributor	recipient		
Total	· · · · · · · · · · · · · · · · · · ·	· · · · · · · · · · · · · · · · · · ·	► 3a	.==
b Approved for future payment  Total			► 3b	

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Inter gross amounts unless otherwise indicated	Unrelate	d business income	Excluded b	y section 512, 513, or 514	(e)
	(a) Business code	<b>(b)</b> Amount	(c) Exclu- sion	<b>(d)</b> Amount	Related or exempt function income (See instructions)
1 Program service revenue			code		
a			1		<del>_</del>
b			-		
c			<b></b>	-	<del></del>
d					
e					
			$\perp$		_,
<b>g</b> Fees and contracts from government agencies			$\vdash$		
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	26,681.	
5 Net rental income or (loss) from real estate	,	<u> </u>		, , , , , , , , , , , , , , , , , , , ,	
a Debt-financed property					
<b>b</b> Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory					15,136
9 Net income or (loss) from special events.					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue				y \$	* (* \$ % \$ ;
a					
b		-			
С					· · -· ·
d					
e					
12 Subtotal Add columns (b), (d), and (e)	2.4			26,681.	15,136
13 Total. Add line 12, columns (b), (d), and (e)	83. 88. \		· · ·	13	41,817
(See worksheet in line 13 instructions to verify calculate	tions )			-	
·			. 5		
Part XVI-B Relationship of Activities to th	e Accompli	isnment of Exemp	t Purpos	ses	

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions)
N/A	
-	

Form 990-PF (2014) SUZANNE & DAVID JACKSON FOUNDATION 22-6821580

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

															-	res	NO
d	lescribed	organization dire d in section 501 o political organ	(c) of th	ne Code (ot	ngage ir ther thar	n any of n section	the follow 501(c)(3)	ing with organiz	any o zations	ther organ s) or in sec	izatioi ition 5	า 27,					
	Ū	s from the repor			a nonch	arıtable	exempt o	rganızatı	ion of								
(	1) Cash	1												-	1 a (1)		X
Ċ	2) Othe	r assets													1 a (2)		X
•	•	nsactions													*		
C	1) Sale:	s of assets to a	noncha	ritable exe	mpt orga	anızatıor	ı								1 b (1)		X
ò	2) Purcl	hases of assets	from a	noncharita	able exer	npt orga	inization							$\vdash$	1 b (2)		X
Ò	<ol> <li>Rent</li> </ol>	al of facilities, e	quipme	nt, or othe	r assets										1 b (3)		Х
ì	4) Reim	bursement arra	ngemer	nts										_	1 b (4)		Х
è	<b>5)</b> Loan	s or loan guarar	ntees											_	1 b (5)		Х
•	•	ormance of servi		membersh	ip or fun	draising	solicitatio	ns						_	1 b (6)		X
•	-,	of facilities, equi			•	•			es					_	1 c		X
	_	•		-													
<b>d</b> I <sup>1</sup> tl a	f the ans he goods any trans	swer to any of the control of the co	ne abov r service ng arran	re is 'Yes,' es given by t igement, st	complete the report how in co	e the fol ting foun olumn <b>(c</b>	lowing sch dation If the d) the value	nedule( he founda ie of the	Colum ation re good:	n <b>(b)</b> shoul eceived less s, other as	ld alw s than sets,	ays sho fair mar or servic	w the fair ket value i ces receiv	mar ın 'ed	ket valı	ue of	
(a) Lın	e no	(b) Amount involve	d .	(c) Name o	of nonchari	table exem	npt organizati	on	(d)	) Description	of trans	fers, tran	sactions, and	d shar	ıng arran	gement	s
N/A									•				-				
													-				
				- ''													
				·													
											_						
		<del></del>			-					-					-		
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			<del>-  </del>					.									
			<u></u>		1 11												
2 a !:	s the tou lescribe	ndation directly o	r indired (c) of th	ctly affiliated ne Code (of	d with, or ther thar	related to section	.o, one or r 1 501(c)(3)	nore tax- i) or in s	exemp	ot organizat i 527?	ions				∏Yes	$\mathbf{x}$	No
		complete the fol		-			(.)(.)	,							ـــا لـــا		
		Name of organi		301100010		(b) Type	of organi	zation		T	(c)	Descrip	otion of re	latio	nship		
N/A	(4)					(=) () (=)					(-,						
. V / A									<u>.</u>	<del> </del>							
					<del>                                     </del>												
					<del>                                     </del>					-							
				-	<del>                                     </del>												
	Under ne	enalties of periury	eclare tha	have exam	uned this	arn, includ	ling accompa	nvina sched	dules ar	d statements.	and to	the best of	my knowled	lge and	d belief, it	ıs true.	
••	correct,	enalties of perjury I d and complete Declar	ation of pi	parer (other	than takpay	yer) is base	d on all infor	mation of w	which pr	eparer has any	y knowl	edge	,	_			
Sign		.) 1/2			<b>-</b>		. ,	/							May the If this return	RS discu	e e
lere(	16	140	<u> </u>				12/16	5/15	- P	TRUSTEE	:				preparer s (see i <u>nst</u> ri	shown b	elow
	Signat	ture of officer of truste	ee				Date		Ī	itle				_		Yes	No
		Print/Type preparer	's name		F	Preparer's	signature	7		Date	,	Checl	( If	PT	IN	*	
Paid		CHARLES F	. HEA	RD, JR	.			~\\{\bar{\}}	<b>)</b>	11/19	1/12	self-e	mployed	P	01342	793	
repa	arer	Firm's name		E AND F		L.L.	P.			· · · · ·	7	Firm's EIN	22-				
•	Only	Firm's address		MORRIS			<del></del>										
ノンピ (	Jilly				J 0790		3	<u>_</u>			—	Phone no	908	-27	7-414	15	
BAA		' <u>.</u>	5011	, 140	, 0, 50	100							200		rm <b>99</b> 0		2014\

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ZU		4

### FEDERAL STATEMENTS

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**SUZANNE & DAVID JACKSON FOUNDATION** 

22-6821580

<b>STATEMENT 1</b>				
FORM 990-PF,	<b>PART</b>	<b>I</b> ,	LINE	16B
<b>ACCOUNTING</b>	<b>FEES</b>	•		

	(A)	(B) NET	(C)	(D)
	EXPENSE	S INVESTMENT	ADJUSTED	CHARITABLE
	PER BOO	KS INCOME	<u>NET INCOME</u>	<u> PURPOSES</u>
ACCOUNTING FEES	moma	55. \$ 2,355. 55. \$ 2,355.	\$ 2,355. \$ 2,355.	\$ 0.

### **STATEMENT 2** FORM 990-PF, PART I, LINE 18 **TAXES**

		(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FEDERAL INCOME TAX FOREIGN TAX	TOTAL	\$ 438. 638. \$ 1,076.	\$ 638. \$ 638.	\$ 0.	\$ 0.

### STATEMENT 3 FORM 990-PF, PART I, LINE 23 OTHER EXPENSES

		(A) EXPENSES		(B) NET INVESTMENT	(C) ADJUSTED	(D) CHARITABLE
		PER BOOK	<u>s                                    </u>	INCOME	NET INCOME	<u>PURPOSES</u>
BANK CHARGES		\$ 21	<u>L. \$</u>	211.	\$ 211.	
	$\mathtt{TOTAL}$	\$ 21	<u>l. \$</u>	211.	<u>\$ 211.</u>	<u>\$ 0.</u>

### STATEMENT 4 FORM 990-PF, PART I, LINE 25 CONTRIBUTIONS, GIFTS, AND GRANTS

CASH GRANTS AND ALLOCATIONS

CLASS OF ACTIVITY: DONEE'S NAME:

DONEE'S ADDRESS:

GENERAL OPERATIONS PAN-MASS CHALLENGE 77 FOURTH AVENUE NEEDHAM, MA 02494 NONE

RELATIONSHIP OF DONEE:

ORGANIZATIONAL STATUS OF DONEE:

AMOUNT GIVEN:

501-C3

CLASS OF ACTIVITY: DONEE'S NAME: DONEE'S ADDRESS: GENERAL OPERATIONS

RELATIONSHIP OF DONEE:

ORGANIZATIONAL STATUS OF DONEE:

AMOUNT GIVEN:

LEHIGH UNIVERSITY 27 MEMORIAL DRIVE BETHLEHEM, PA 18015 NONE

501-C3

31,500.

5,000.

2014

### FEDERAL STATEMENTS

PAGE 2

SUZANNE & DAVID JACKSON FOUNDATION

22-6821580

**STATEMENT 4 (CONTINUED)** FORM 990-PF, PART I, LINE 25 **CONTRIBUTIONS, GIFTS, AND GRANTS** 

CLASS OF ACTIVITY: DONEE'S NAME: DONEE'S ADDRESS:

RELATIONSHIP OF DONEE:

ORGANIZATIONAL STATUS OF DONEE:

AMOUNT GIVEN:

CLASS OF ACTIVITY:

DONEE'S NAME: DONEE'S ADDRESS:

RELATIONSHIP OF DONEE: ORGANIZATIONAL STATUS OF DONEE:

AMOUNT GIVEN:

CLASS OF ACTIVITY: DONEE'S NAME: DONEE'S ADDRESS:

RELATIONSHIP OF DONEE:

ORGANIZATIONAL STATUS OF DONEE:

AMOUNT GIVEN:

CLASS OF ACTIVITY: DONEE'S NAME:

DONEE'S ADDRESS:

RELATIONSHIP OF DONEE:

ORGANIZATIONAL STATUS OF DONEE:

AMOUNT GIVEN:

CLASS OF ACTIVITY: DONEE'S NAME: DONEE'S ADDRESS:

RELATIONSHIP OF DONEE: ORGANIZATIONAL STATUS OF DONEE:

AMOUNT GIVEN:

GENERAL OPERATIONS

ST BENEDICTS PREPARATORY SCHOOL

520 MARTIN LUTHER KING BLVD

NEWARK, NJ 07102

NONE

501 (C) (3)

10,000.

GENERAL OPERATIONS

SUMMIT FIRST AID SQUAD

ELM STREET

SUMMIT, NJ 07901

NONE

501 (C) (3)

1,000.

GENERAL OPERATIONS

ST MARKS EPISCOPAL CHURCH

140 SOUTH FINLEY AVE

BASKING RIDGE, NJ 07920

NONE

501 C 3

1,000.

GENERAL OPERATIONS

HOUSING ASSISTANCE CORP

460 WEST MAIN ST

HYANIS, MA 02601

NONE

501 C 3

500.

GENERAL OPERATIONS

ST MARYS EPISCOPAL CHURCE

623 SECOND S E OCEAN BLVD

STEWART, FL 34994

NONE

501 (C) (3)

25,000.

TOTAL \$ 74,000.

STATEMENT 5 FORM 990-PF, PART III, LINE 5 OTHER DECREASES

NET UNREALIZED GAINS OR LOSSES ON INVESTMENTS

125,540. 125,540. TOTAL \$

2014

### **FEDERAL STATEMENTS**

PAGE 3

### **SUZANNE & DAVID JACKSON FOUNDATION**

22-6821580

**STATEMENT 6** FORM 990-PF, PART XV, LINE 2A-D APPLICATION SUBMISSION INFORMATION

NAME OF GRANT PROGRAM:

NAME:

SUZANNE & DAVID JACKSON FOUNDATION

10 EUCLID AVENUE (#602)

SUMMIT, NJ 07901 908-273-3675

CARE OF:

STREET ADDRESS:

CITY, STATE, ZIP CODE:

TELEPHONE:

E-MAIL ADDRESS:

FORM AND CONTENT:

SUBMISSION DEADLINES: RESTRICTIONS ON AWARDS: BRIEF LETTER EXPLAINING APPEAL NEED

# SUZANNE & DAVID JACKSON FOUNDATION INVESTMENT ANALYSIS SEPTEMBER 30, 2015

	SEF I LINDER 30, 2013		MARKET
CHADEC	COMPANY	COST	VALUE
SHARES	<u>COMPANY</u> VANGUARD ENERGY ETF	100,003.90	84,760 00
1,000 000		90,063.30	129,612.00
2,800 000	VANGUARD FINANCIALS ETF VANGUARD SMALL CAP VALUE		
326 412		23,101.84 24,807.78	31,613.00
690.000	ADOBE SYSTEMS	,	56,731 80
690 000	ALEXION PHARMACEUTICALS	18,724.77	107,909 10
231 000	ALLEGION PUBLIC LTD	4,886.29	13,319 46
585.000	AUTOMATIC DATA PROCESSING	20,257.32	47,010 60
195 000	CDK GLOBAL INC	2,930.99	9,317 10
96 000	CHEMOURS COMPANY	1,171.82	621 12
200 000	CHEVRON CORP	14,571.56	15,776.00
580 000	COGNIZANT TECH SOLUTIONS	6,546.63	36,313 80
345 886	CUMMINS INC	10,556.51	37,556 30
480 000	DUPONT D I DE NEMOURS	21,872 79	23,136.00
325.000	EXXON MOBIL CORP	22,491 17	24,163.75
1,280.000	GENERAL ELECTRIC CO	20,304 00	32,281 60
45.000	GOOGLE INC A	13,103 91	28,726 65
45.000	GOOGLE INC C	13,062 04	27,378 90
475 000	ILLINOIS TOOL WORKS	22,887 97	39,097 25
695 000	INGERSOLL RAND	19,062.44	35,285 15
80 000	INTUITIVE SURGICAL INC	22,313 94	36,766 40
210 000	KRAFT HEINZ CO	6,865.34	14,821 80
434.000	LEUCADIA NATIONAL CORP	9,621 11	8,792 84
800.000	LINCOLN NATIONAL CORP	19,635.48	37,968 00
630.000	MONDELEZ INTERNATIONAL	12,699 62	26,378.10
530 000	NOBLE COPR	20,358 81	5,782.30
48 000	NOVARTIS AG	2,633 28	4,412.16
176 000	PARAGON OFFSHORE PLC	2,848.51	42.24
790.000	RESMED INC	23,462.45	40,258 40
92.000	SANOFI SPON ADR	3,594 35	4,367 24
26.549	SIEMENS AG SPON ADR	2,461 83	2,370 82
455 000	SOUTHWESTERN ENERGY	20,612 73	5,773 95
210 000	SUBSEA 7 SA SPON	2,272 18	1,547 70
700 000	SUN LIFE FINANCIAL	20,274 45	22,582 00
350 000	TARGET CORP	17,264 42	27,531 00
785.000	TE CONNECTIVITY LTD	15,599 36	47,013 65
590.000	THOMPSON REUTERS CORP	18,805 01	23,753 40
142.000	UNILEVER PLC	3,882 26	5,790 76
327 343	UNITED PARCEL SERVICE	24,723 75	32,305 48
565 000	WESTERN DIGITAL CORP	22,602 99	44,883 60
623.141	YUM BRANDS INC	26,153 03	49,820 12
420.000	ZIMMER HOLDINGS INC	16,825 03	39,450.60
	TOTAL	765,916 96	1,263,022 14

# Expenses of the foundation for 2015

Danations	<u>.</u>						
ਜ	Name St Benedicts Prepatory School	Address 520 Martin Luther King Blvd. Newark, NJ 07102	Class of activity General Operations	Relationship None	Status 501-C3	Amount \$	10,000.00
7	Lehigh University 🗡	27 Memorial Drive West Bethelehem, PA 18015-3086	General Operations	None	501-C3	<b>5</b> 5	31,500.00
m	Summit First Aid Squad	50 Elm St Summit NJ 07901	General Operations	None	501-C3	•^	1,000.00
4	Pan Mass Challenge	77 Fourth Ave Needham MA 02494	General Operations	None	501-C3	<b>\$</b>	2,000.000 2
ហ	St Marks Episcopal Church	140 S. Findley Av Basking Ridge. NJ 07920	General Operations	None	501-C3	<b>v</b>	1,000.00
9	Housing Assistance Corp	460 West Main St.	General Operations		501-C3	<b>\$</b>	200:00
^	St Mary"s Episcopal Church 🗶	Hyanis, MA Uzbūī 623 Second S E Ocean Blvd Stuart, FL 34994	General Operations		501-C3	<b>v</b> s	25,000.00
				Total gifts		ν	74,000.00