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Department of the Treasury

Internal Revenue Service

DLN: 93491109001046

OMB No 1545-0052

Open to Public Inspection

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

▶ 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 <u>www.irs.gov/form990pf</u>.

| | | ndar year 2014, or tax year beginning 12- | 01-2014 | , ar | nd ending 1 | | | |
|----------------|---------------|---|---------------------------------------|----------|--------------------------|--|--|--|
| | | undation C AND INA C PITT CHARITABLE TRUST | | | | entification numbe | er | |
| | | | | - | 38-3268352 | | | |
| | | I street (or P O box number if mail is not delivered to street addres /N CENTER NO 1350 | s) Room/suite | | B Telephone nu | mber (see instructior | ns) | |
| 20 | OU TOW | IN CENTER NO 1990 | | | (248) 353-7290 | | | |
| | | n, state or province, country, and ZIP or foreign postal code , MI 48075 | 1 | | C If exemption | application is pendin | g, check here 🕨 🦵 | |
| G C | neck a | ll that apply Initial return Initial return of a | former public charity | , | D 1. Foreign or | ganizations, check h | ere 🕨 🗀 | |
| | _ | Final return Amended return | · · · · · · · · · · · · · · · · · · · | | - | ganizations meeting | | |
| | | Address change Name change | | | test, chec | k here and attach co | mputation | |
| | | ype of organization Section 501(c)(3) exempt priving 4947(a)(1) nonexempt charitable trust Other tax | | _ | | ındatıon status was t n 507(b)(1)(A), chec | | |
| | | ket value of all assets at end J Accounting method | Cash Accr | | F If the founds | stron in in a CO month | h tamamatian | |
| of | ear <i>(f</i> | from Part II, col. (c), \$\frac{1}{2}\$ (Part I, column (d) mus) | | uai | | ation is in a 60-montl n 507(b)(1)(B), chec | | |
| Pa | rt I | Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions)) | (a) Revenue and expenses per books | (b) l | Net investment income | (c) Adjusted net income | (d) Disbursements for charitable purposes (cash basis only) | |
| | 1 | Contributions, gifts, grants, etc , received (attach | | | | | | |
| | | schedule) | | | | | | |
| | 2 | Check ► if the foundation is not required to attach Call B | | | | | | |
| | _ | Sch B | F 300 | <u> </u> | F 200 | | | |
| | 3 | Interest on savings and temporary cash investments | 5,200 36,862 | | 5,200 36,862 | | | |
| | 4 | Dividends and interest from securities | 36,862 | - | 30,862 | | | |
| | 5a b | Net rental income or (loss) | | - | | | | |
| φ | Б 6а | Net gain or (loss) from sale of assets not on line 10 | -59 | | | | | |
| <u> </u> | b | Gross sales price for all assets on line 6a | | | | | | |
| Revenue | | 101,194 | | | | | | |
| | 7 | Capital gain net income (from Part IV, line 2) | | | 0 | | | |
| | 8 | Net short-term capital gain | | | | | | |
| | 9 | Income modifications | | | | | | |
| | 10a | Gross sales less returns and allowances | | | | | | |
| | ь | Less Cost of goods sold | | | | | | |
| | c | Gross profit or (loss) (attach schedule) | | | | | | |
| | 11 | Other income (attach schedule) | 1,294,856 | | 194,856 | 0 | | |
| | 12 | Total. Add lines 1 through 11 | | | 236,918 | 0 | | |
| | 13 | Compensation of officers, directors, trustees, etc | 0 | | 0 | 0 | 0 | |
| س | 14 | Other employee salaries and wages | | <u> </u> | | | | |
| φ | 15 | Pension plans, employee benefits | | | | | | |
| Expenses | 16a | Legal fees (attach schedule) | (S) | | | - | 6.46= | |
| Ä | b | Accounting fees (attach schedule) | 12,200 | | 6,100 | 0 | 6,100 | |
| φ> | 1 C | Other professional fees (attach schedule) | | | | | | |
| rati | 17 | Interest | % 11,801 | - | 0 | 0 | 0 | |
| Administrative | 18 19 | Taxes (attach schedule) (see instructions) Depreciation (attach schedule) and depletion | 11,801 | | 0 | 0 | | |
| Ⅱ | 20 | Occupancy | | | | | | |
| ₽ë | 21 | Travel, conferences, and meetings | | - | | | | |
| | 22 | Printing and publications | | | | | | |
| ਰ ਹ | 23 | Other expenses (attach schedule) | 91,798 | | 0 | 0 | 0 | |
| Operating and | 24 | Total operating and administrative expenses. | | | | | | |
| ត ក | | Add lines 13 through 23 | 115,799 | | 6,100 | 0 | 6,100 | |
| ă | 25 | Contributions, gifts, grants paid | 405,609 | | | | 405,609 | |
| | 26 | Total expenses and disbursements. Add lines 24 and 25 | 521,408 | | 6,100 | 0 | 411,709 | |
| | 27 | Subtract line 26 from line 12 | 321,400 | | 0,100 | | 711,709 | |
| | 2, a | Excess of revenue over expenses and disbursements | 815,451 | | | | | |
| | Б . | Net investment income (if negative, enter -0-) | | | 230,818 | | | |
| | _ | Adjusted net income (if negative enter -0-) | | | • | 0 | | |

| Da | rt II | Balance Sheets Attached schedules and amounts in the description column | Beginning of year | | f year |
|---------------|-------|--|-----------------------|------------------|-----------------------|
| - | | Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions) | (a) Book Value | (b) Book Value | (c) Fair Market Value |
| | 1 | Cash—non-interest-bearing | 304,644 | 145,784 | 145,784 |
| | 2 | Savings and temporary cash investments | | | |
| | 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 🟲 | | | |
| 2 | 8 | Inventories for sale or use | | | |
| sets | 9 | Prepaid expenses and deferred charges | | | |
| Ę. | 10a | Investments—U S and state government obligations (attach schedule) | | | |
| | b | Investments—corporate stock (attach schedule) | 243,327 | 1,285,273 | 1,256,631 |
| | С | Investments—corporate bonds (attach schedule) | | | |
| | 11 | Investments—land, buildings, and equipment basis | | | |
| | | Less accumulated depreciation (attach schedule) ▶ | | | |
| | 12 | Investments—mortgage loans | | | _ |
| | | Investments—other (attach schedule) | 966,977 | 99,342 | 899,342 |
| | | 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 | | | |
| | 10 | instructions Also, see page 1, item I) | 1,514,948 | 2,330,399 | 2,301,757 |
| | 17 | Accounts payable and accrued expenses | _,, | _, | |
| | 18 | Grants payable | | | |
| y, | 19 | Deferred revenue | | | |
| abilities | | Loans from officers, directors, trustees, and other disqualified persons | | | |
| ā | 20 | Mortgages and other notes payable (attach schedule) | | | |
| | 21 | . | | | |
| | 22 | Other liabilities (describe) | 0 | 0 | |
| | 23 | Total liabilities (add lines 17 through 22) | 0 | 0 | |
| Ş. | | Foundations that follow SFAS 117, check here | | | |
| Fund Balances | | and complete lines 24 through 26 and lines 30 and 31. | | | |
| <u>8</u> | 24 | Unrestricted | | | |
| ă | | Temporarily restricted | | | |
| 핅 | 26 | Permanently restricted | | | |
| ᠴ | | Foundations that do not follow SFAS 117, check here | | | |
| ŏ | | and complete lines 27 through 31. | | | |
| Assets | 27 | Capital stock, trust principal, or current funds | 1,838,806 | 1,838,806 | |
| Š | 28 | Paid-in or capital surplus, or land, bldg , and equipment fund | 0 | 0 | |
| | 29 | Retained earnings, accumulated income, endowment, or other funds | -323,858 | 491,593 | |
| Net | 30 | Total net assets or fund balances (see instructions) | 1,514,948 | 2,330,399 | |
| | 31 | Total liabilities and net assets/fund balances (see instructions) | 1,514,948 | 2,330,399 | |
| Pa | rt II | | | | |
| 1 | | Total net assets or fund balances at beginning of year—Part II, column | (a), line 30 (must a | gree | |
| | | with end-of-year figure reported on prior year's return) | | 1 | 1,514,948 |
| 2 | | Enter amount from Part I, line 27a | | 2 | 815,451 |
| 3 | | Other increases not included in line 2 (itemize) | | 3 | 0 |
| 4 | | Add lines 1, 2, and 3 | | 4 | 2,330,399 |
| 5 | | Decreases not included in line 2 (itemize) ▶ | | 5 | 0 |
| 6 | | Total net assets or fund balances at end of year (line 4 minus line 5)—P | art II, column (b), l | ne 30 . 6 | 2,330,399 |

| Form 990-PF (2014) | | and for Tay on Tays | stare and Tares and | | | Page 3 |
|--|---------------|--|---|------------------------------------|---|---|
| Part IV Capital Gains | | | | (b) How acquired | | |
| | • | s) of property sold (e g , re ommon stock, 200 shs M | • | P—Purchase D—Donation | (c) Date acquired (mo , day, yr) | (d) Date sold (mo , day, yr) |
| 1a CHARLES SCHWAE | 3 | | | Р | 2013-02-26 | 2015-09-16 |
| b CAPITAL GAINS D | IVIDENDS | | | Р | | |
| С | | | | | | |
| | | | | | | |
| | | | | | | |
| e | | (6) D | 4 (-2) (-2 | L | (1) (2-1) | (1) |
| (e) Gross sales price | | (f) Depreciation allowe (or allowable) | 1 | t or other basıs opense of sale | | or (loss)) minus (g) |
| a | 100,010 | (** *********************************** | , , , , , , , , , , , , , , , , , , , | 101,25 | | -1,243 |
| b | 1,184 | | | , | | 1,184 |
| | 1,10 | | | | | 2/20 |
| <u> </u> | | | | | | |
| d | | | | | | |
| e | | | | | | |
| Complete only for assets | showing ga | in in column (h) and owne | | | | (h) gain minus |
| (i) F M V as of 12/31/69 | • | (j) Adjusted basis as of 12/31/69 | , , , | cess of col (1) col (j), ıf any | | less than -0-) or om col (h)) |
| | | as 0(12/31/09 | Over 0 | cor (j), ir arry | 203303 (11 | -1,243 |
| a L | | | | | | 1,184 |
| b | | | | | | 1,104 |
| С | | | | | | |
| d | | | | | | |
| е | | | | | | |
| 2 Capital gain net inc | ome or (net | capital loss) | If gain, also enter If (loss), enter -0- | | 2 | - 5 9 |
| 3 Net short-term cap | tal gaın or (| loss) as defined in sectio | ns 1222(5) and (6 |) | | |
| If gain, also enter in in Part I, line 8 | Part I, line | 8, column (c) (see instru | ctions) If(loss), e | nter -0 - | 3 | |
| Part V Qualification | Under Se | ection 4940(e) for R | educed Tax or | Net Investme | | |
| For optional use by domestic | | | | | | |
| f section 4940(d)(2) applies | leave this | nart hlank | | | | |
| Vas the foundation liable for t | he section 4 | 4942 tax on the distributa | • | | eriod? | ┌ Yes ┌ No |
| f "Yes," the foundation does | | | | | | |
| 1 Enter the appropriate am | ount in each | n column for each year, so | ee instructions befo | ore making any ent | ries | |
| (a) Base period years Calendar year (or tax year beginning in) | Adjuste | (b) ed qualifying distributions | (c) Net value of noncha | ritable-use assets | (d) Distribution (col (b) divided | n ratio |
| 2013 | | 299,850 | | 1,528,090 | · · | 0 196225 |
| 2012 | | 301,996 | | 614,736 | | 0 491261 |
| 2011 | | 267,079 | | 813,481 | | 0 328316 |
| 2010 | | 163,702 | | 870,664 | | 0 188020 |
| 2009 | | 413,676 | | 1,176,182 | | 0 351711 |
| 2 Total of line 1, colui | mn (d) | | | | 2 | 1 555533 |
| | | ie 5-year base period—div | | | _ | |
| | | tion has been in existence | | _ | 3 | 0 311107 |
| | | table-use assets for 2014 | • | <u> </u> | 4 | 2,325,864 |
| | | | | | 5 | 723,593 |
| 6 Enter 1% of net inv | estment inc | ome (1% of Part I, line 2 | 7b) . | | 6 | 2,308 |
| 7 Add lines 5 and 6. | | | | [| 7 | 725,901 |
| 8 Enter qualifying dist | ributions fr | om Part XII, line 4 | | [| 8 | 411,709 |
| If line 8 is equal to o the Part VI instruct | | nan line 7, check the box | ın Part VI, lıne 1b, | and complete that | part using a 1% tax | rate See |

| Form | 990-PF (2014) | | Р | age 4 |
|------|--|--------------|-----|--------------|
| Pai | Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the installation | tructio | ns) | |
| 1a | Exempt operating foundations described in section 4940(d)(2), check here 🟲 🦵 and enter "N/A" 🔰 | | | |
| | on line 1 | | | |
| | Date of ruling or determination letter(attach copy of letter if necessary–see | | | |
| h | instructions) Domestic foundations that meet the section 4940(e) requirements in Part V, check | | | 1 6 1 6 |
| b | , | | | 4,616 |
| | here F and enter 1% of Part I, line 27b | | | |
| С | 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 | | • | 4,616 |
| 4 | Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others | | | 0 |
| _ | enter -0-) Tay based on investment in some Cubtract line 4 from line 2. If you are less on the 2. | | | 0 |
| 5 | Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0 | | | 4,616 |
| 6 | Credits/Payments | | | |
| а | 2014 estimated tax payments and 2013 overpayment credited to 2014 6a 7,880 | | | |
| 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 | | • | 7,880 |
| 8 | Enter any penalty for underpayment of estimated tax. Check here 🗀 if Form 2220 is attached. | | | |
| 9 | Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed | | | |
| 10 | Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 | | | 3,264 |
| 11 | Enter the amount of line 10 to be Credited to 2015 estimated tax 3,264 Refunded 11 | | | 0 |
| Par | t VII-A Statements Regarding Activities | | | |
| 1a | During the tax year, did the foundation attempt to influence any national, state, or local legislation or did | | Yes | No |
| | ıt participate or intervene in any political campaign? | . 1a | | No |
| b | Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions | | | |
| | for definition)? | 1b | | No |
| | If the answer is "Yes" to 1a or 1b , attach a detailed description of the activities and copies of any materials | | | |
| | published or distributed by the foundation in connection with the activities. | | | |
| c | Did the foundation file Form 1120-POL for this year? | 1c | | No |
| d | Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year | | | |
| • | (1) On the foundation \$\ \\$0 (2) On foundation managers \$\ \\$0 | | | |
| e | Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed | | | |
| - | on foundation managers \blacktriangleright \$0 | | | |
| 2 | Has the foundation engaged in any activities that have not previously been reported to the IRS? |] 2 | | No |
| 2 | | | | No |
| _ | If "Yes," attach a detailed description of the activities. | | | |
| 3 | Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles | | | |
| _ | of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes | . 3 | | No |
| 4a | Did the foundation have unrelated business gross income of \$1,000 or more during the year? | 4a | | No |
| Ь | If "Yes," has it filed a tax return on Form 990-T for this year? | 4b | | |
| 5 | Was there a liquidation, termination, dissolution, or substantial contraction during the year? | . 5 | | No |
| | If "Yes," attach the statement required by General Instruction T. | | | |
| 6 | Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either | l | | ļ |
| | By language in the governing instrument, or | | | |
| | By state legislation that effectively amends the governing instrument so that no mandatory directions | |] . | |
| | that conflict with the state law remain in the governing instrument? | . 6 | | No |
| 7 | Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), | | | |
| | and Part XV. | . 7 | Yes | |
| 8a | Enter the states to which the foundation reports or with which it is registered (see instructions) | | | |
| | <u>MI</u> | | | |
| b | If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney | | | |
| | General (or designate) of each state as required by General Instruction G? If "No," attach explanation . | 8b | Yes | |
| 9 | Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) | | | |
| | or 4942(j)(5) for calendar year 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)? | | | |
| | If "Yes," complete Part XIV | . 9 | | No |
| 10 | Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names | | | |
| | and addresses | . 10 | | No |
| | | | | |

| 11 | At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the | | | |
|-----|---|----------|------|--------------|
| | meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions) | 11 | | No |
| 12 | Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had | | | |
| | advisory privileges? If "Yes," attach statement (see instructions) | 12 | | No |
| 13 | Did the foundation comply with the public inspection requirements for its annual returns and exemption application? | 13 | Yes | |
| | Website address ►N/A | | | |
| 14 | The books are in care of ►CARLEEN F LUNSFORD Telephone no ►(248) | 353- | 7290 | |
| | Located at ►2000 TOWN CENTER STE 1350 SOUTHFIELD MI ZIP+4 ►48075 | | | |
| 15 | Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here | | | ─ |
| 13 | and enter the amount of tax-exempt interest received or accrued during the year | | , | , |
| | <u> </u> | | 1 | l |
| 16 | At any time during calendar year 2014, did the foundation have an interest in or a signature or other authority over | مدا | Yes | No |
| | a bank, securities, or other financial account in a foreign country? | 16 | | No |
| | See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes", enter the name of the foreign country | | | |
| | | | | |
| Par | t VII-B Statements Regarding Activities for Which Form 4720 May Be Required | | I I | |
| | File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. | <u> </u> | Yes | No |
| 1a | During the year did the foundation (either directly or indirectly) | | | |
| | (1) Engage in the sale or exchange, or leasing of property with a disqualified person? Yes V No | | | |
| | (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) | | | |
| | a disqualified person? | | | |
| | (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes Vo | | | |
| | (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes Vo | | | |
| | (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)? | | | |
| | for the benefit or use of a disqualified person)? | | | |
| | 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) | | | |
| ь | If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations | | | |
| | section 53 4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? | 1b | | |
| | Organizations relying on a current notice regarding disaster assistance check here | | | |
| _ | 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 | | | -110 |
| _ | operating foundation defined in section 4942(1)(3) or 4942(1)(5)) | | | |
| а | At the end of tax year 2014, did the foundation have any undistributed income (lines 6d | | | |
| _ | and 6e, Part XIII) for tax year(s) beginning before 2014? Yes ▽ No | | | |
| | If "Yes," list the years 🕨 20 , 20 , 20 , 20 | | | |
| b | Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) | | | |
| | (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) | | | |
| | to all years listed, answer "No" and attach statement—see instructions) | 2b | | |
| c | If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here | | | |
| | ▶ 20, 20, 20 | | | |
| За | Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at | | | |
| | any time during the year? | | | |
| b | If "Yes," did it have excess business holdings in 2014 as a result of (1) any purchase by the foundation | | | |
| | or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved | | | |
| | by the Commissioner under section $4943(c)(7)$) to dispose of holdings acquired by gift or bequest, or (3) | | | |
| | the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine | | | |
| | ıf the foundation had excess business holdings in 2014.). | 3b | | |
| 4a | Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? | 4a | | No |
| b | Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its | | | |
| | charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2014? | 4b | | No |

| | rt VIII-B Statements Rega | ardir | a Activities for | \A/F | nich Form 4720 | Max | Re Pequired (cont | inuo | d١ | rage U |
|-------|--|--------|--|--------|----------------------------|-------|--|------|----------------|-----------------------|
| 5a | During the year did the foundation | | _ | | 1101111 4720 | ria j | be Required (cont. | mue | Ϊ Τ | |
| Ju | (1) Carry on propaganda, or other | | • | | uslation (section 49) | 45(6 |))? | - No | | |
| | (2) Influence the outcome of any | | | | | | | 110 | | |
| | on, directly or indirectly, any | | | | | | | - No | | |
| | (3) Provide a grant to an individu | | | | | • | r Yes ✓ | | | |
| | (4) Provide a grant to an organiz | atıon | other than a charita | ble, | etc , organization de | | ped | | | |
| | in section 4945(d)(4)(A)? (s | ee ins | structions) | | | • | \ Yes 🖓 | No | | |
| | (5) Provide for any purpose othe educational purposes, or for | | = : | - | | | Yes 🗸 | - No | | |
| b | If any answer is "Yes" to 5a(1)- | | | | | | | | | |
| | Regulations section 53 4945 or | | | | · · · · · | | • | | . 5b | |
| | Organizations relying on a curre | | | | | | | | | |
| c | If the answer is "Yes" to questio | | | | | | | | | |
| | tax because it maintained expen | | • • | | · | | | - No | | |
| | If "Yes," attach the statement requ | | | | | | | | | |
| 6a | Did the foundation, during the ye | | - | | | prer | niums on | | | |
| | a personal benefit contract? | | | | | | | No | | |
| b | Did the foundation, during the ye | ar, pa | y premiums, directly | y or | indirectly, on a perso | nal | benefit contract? | | 6b | No |
| | If "Yes" to 6b, file Form 8870. | | | | ,, , | | | | | |
| 7a | At any time during the tax year, | was tl | ne foundation a party | v to a | a prohibited tax shel | tert | ransaction? TYes V | No | | |
| b | If yes, did the foundation receive | | | | · | | · · · | | 7b | |
| | Information Abou | | | | | | n Managers, Highly | | Emp | lovees, |
| Pa | and Contractors | | , | | , | | | | | |
| _1 | List all officers, directors, trustee | s, fo | ındation managers a | nd t | heir compensation (| see i | nstructions). | | | |
| | (a) Nama and adduces | (b) | Title, and average | | c) Compensation | | (d) Contributions to | (e) | Expens | e account, |
| | (a) Name and address | l de | hours per week evoted to position | ' | If not paid, enter -0-) | | mployee benefit plans I deferred compensation | | | wances |
| MURE | РАУ С РІТТ | | SIDENT | | 0 | | 0 | | | 0 |
| | 0 TOWN CENTER STE 1350 THFIELD, MI 48075 | 2 00 | | | | | | | | |
| INA C | · | VIC | E PRESIDENT | | 0 | | 0 | | | 0 |
| | 0 TOWN CENTER STE 1350 THFIELD,MI 48075 | 2 00 | | | Ç | | Ü | | | ŭ |
| | R FRANKEL | DIR | ECTOR | | 0 | | 0 | | | 0 |
| 200 | 0 TOWN CENTER STE 1350 | 2 00 | | | | | | | | |
| SOU | THFIELD,MI 48075 | | | | | | | | | |
| _2 | Compensation of five highest-pai | d emp | loyees (other than | thos | e included on line 1- | -see | instructions). If none, en | ter" | NONE." | |
| (a) | Name and address of each emplo paid more than \$50,000 | yee | (b) Title, and aver hours per week devoted to positi | | (c) Compensation | n | (d) Contributions to employee benefit plans and deferred compensation | | | e account, owances |
| NON | IE | | | | | | | | | |
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| | | | - | | | | | | | |
| Tota | I number of other employees hald | over (| <u> </u> | | | | <u> </u> | | | |

| Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued) | | | | | | |
|---|---|------------------|--|--|--|--|
| 3 Five highest-paid independent contractors for professional serv | ices (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 | | | | | | |
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| | | | | | | |
| 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 | | | | | | |
| | | | | | | |
| | do relevant statistical information such as the number of | | | | | |
| | | Expenses | | | | |
| 1 | | | | | | |
| 2 | | | | | | |
| 3 | | | | | | |
| | | | | | | |
| | | | | | | |
| | luring the tax year on lines 1 and 2 | Amount | | | | |
| 1 | | | | | | |
| | | | | | | |
| 2 | | | | | | |
| | | | | | | |
| | | | | | | |
| All other program-related investments See instructions | | | | | | |
| 3 | | | | | | |
| | | | | | | |
| | | | | | | |
| Total. Add lines 1 through 3 | | 0 | | | | |

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations. see instructions.) Fair market value of assets not used (or held for use) directly in carrying out charitable, etc. 1 purposes 1a 1h 1.394.306 1c 966.977 1d 2.361.283 Reduction claimed for blockage or other factors reported on lines 1a and 1e 2 2 3 3 Subtract line 2 from line 1d. 2.361.283 Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see 4 35.419 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V. line 4. 5 2.325.864 5 116,293 **Distributable Amount** (see instructions) (Section 4942(1)(3) and (1)(5) private operating foundations and Part XT certain foreign organizations check here $\blacktriangleright \Gamma$ and do not complete this part.) 116.293 1 Tax on investment income for 2014 from Part VI, line 5. 4.616 2a Income tax for 2014 (This does not include the tax from Part VI). . . 2c 4.616 3 111,677 3 4 4 5 5 111.677 Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1. . . 7 7 111.677 Part XIII Oualifying Distributions (see instructions) Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes 1 Expenses, contributions, gifts, etc —total from Part I, column (d), line 26. 1a 411,709 1b 0 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc. 2 2 3 Amounts set aside for specific charitable projects that satisfy the За. 3b 4 Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4 411,709 4 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment 411,709 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

| | art XIII Undistributed Income (see instr | ructions | | | r age 3 |
|--------|--|-----------|---------------------|-------------|--------------------|
| F | ondistributed income (see misti | (a) | (b) | (a) | (d) |
| | | Corpus | Years prior to 2013 | (c) 2013 | (d) 2014 |
| 1 | Distributable amount for 2014 from Part XI, line 7 | Corpus | rears prior to 2015 | 2013 | 111,677 |
| 2 | | | | | · |
| a | | | | 0 | |
| b | • | | 0 | | |
| | Total for prior years 20, 20, 20 Excess distributions carryover, if any, to 2014 | | | | |
| a | From 2009 | 7 | | | |
| a b | From 2010 | 4 | | | |
| c | From 2011 | | | | |
| d | 7001120111 | 4 | | | |
| | From 2013 | 1 | | | |
| | Total of lines 3a through e | 1,235,467 | | | |
| | Qualifying distributions for 2014 from Part | | | | |
| - | XII, line 4 > \$ 411,709 | | | | |
| а | Applied to 2013, but not more than line 2a | | | 0 | |
| | Applied to undistributed income of prior years | | 0 | | |
| _ | (Election required—see instructions) | | | | |
| c | Treated as distributions out of corpus (Election | 0 | | | |
| | required—see instructions) | | | | |
| d | Applied to 2014 distributable amount | | | | 111,677 |
| е | Remaining amount distributed out of corpus | 300,032 | | | |
| 5 | Excess distributions carryover applied to 2014 | 0 | | | 0 |
| | (If an amount appears in column (d), the | | | | |
| | same amount must be shown ın column (a).) | | | | |
| 6 | Enter the net total of each column as | | | | |
| | indicated below: | 4 505 400 | | | |
| | Corpus Add lines 3f, 4c, and 4e Subtract line 5 | 1,535,499 | | | |
| Ь | Prior years' undistributed income Subtract | | 0 | | |
| | line 4b from line 2b | | ů, | | |
| С | 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 | | |
| е | Undistributed income for 2013 Subtract line | | | | |
| | 4a from line 2a Taxable amount—see | | | 0 | |
| £ | Undistributed income for 2014 Subtract | | | | |
| ' | lines 4d and 5 from line 1 This amount must | | | | |
| | be distributed in 2015 | | | | 0 |
| 7 | Amounts treated as distributions out of | | | | |
| | corpus to satisfy requirements imposed by | | | | |
| | section 170(b)(1)(F) or 4942(g)(3) (Election may | 0 | | | |
| _ | be required - see instructions) | | | | |
| 8 | Excess distributions carryover from 2009 not | 359,417 | | | |
| ٥ | applied on line 5 or line 7 (see instructions) Excess distributions carryover to 2015. | | | | |
| 3 | Subtract lines 7 and 8 from line 6a | 1,176,082 | | | |
| 10 | Analysis of line 9 | | | | |
| | 124 704 | 1 | | | |
| ь | Excess from 2011 | 4 | | | |
| c | Excess from 2012 289,103 | 4 | | | |
| d | Excess from 2013 231,304 | 1 | | | |
| | Excess from 2014 300,032 | 2 | | | |

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

c Any submission deadlines

factors

Form **990-PF** (2014)

| Part XV Supplementary Inform 3 Grants and Contributions Paid | During the Year or An | proved for F | uture Pavment | |
|---|---|-------------------------|---------------------|---------|
| Recipient | If recipient is an individual, show any relationship to | Foundation status of | Purpose of grant or | A mount |
| Name and address (home or business) | any foundation manager or substantial contributor | recipient | contribution | |
| a Paid during the year See Additional Data Table | or substantial contributor | recipient | | |
| | | | | |
| Total | <u> </u> | <u> </u> | | 405,60 |
| | | | | |
| | | | h. at | |

| Form 990-PF (2014) | | | | | Page 12 |
|--|-------------------|--------------------|---------------------|--------------------|---|
| Part XVI-A Analysis of Income-Produci Enter gross amounts unless otherwise indicated | _ | usiness income | Excluded by section | n 512, 513, or 514 | (e) |
| 1 Program service revenue | (a) Business code | (b) A mount | (c) Exclusion code | (d) A mount | Related or exempt function income (See instructions) |
| a b | | | | | |
| c d | | | | | |
| e f | | | | | |
| g Fees and contracts from government agencies 2 Membership dues and assessments 3 Interest on savings and temporary cash | | | | | |
| Investments | | | 14 18 | 5,200 36,862 | |
| 5 Net rental income or (loss) from real estate a Debt-financed property | | | | | |
| b Not debt-financed property6 Net rental income or (loss) from personal property | | | | | |
| 7 Other investment income | | | 18 | -59 | |
| 9 Net income or (loss) from special events | | | 10 | | |
| 10 Gross profit or (loss) from sales of inventory 11 Other revenue a SECTION 72 ANNUITY INCOME | | | 14 | 194,856 | |
| b LIFE INS PROCEEDS - NONTAXABLE | | | 14 | 1,100,000 | |
| c d | | | | | |
| e 12 Subtotal Add columns (b), (d), and (e) | | (| | 1,336,859 |) |
| 13 Total. Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify call. | | | : | 13 | 1,336,859 |
| Part XVI-B Relationship of Activities to Explain below how each activity for which the accomplishment of the foundation's instructions) | h income is re | ported ın column (| e) of Part XVI-A c | ontributed importa | |
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| Form 990-P | F (2014) | | | | | | | | | | Рa | ge 13 |
|-------------------------------|--|--|----------------------------|---|-------------------------------------|-------------------------------|---|---|--|---------------------------|--------|--------------|
| Part XVI | I Information R Noncharitable | | | | | actio | ns and I | Relationships \ | With | | | |
| section 5 | organization directly or i | ndirectly 6 | engage | ın any of | the following wit | | | | | | Yes | No |
| organiza | | | | | | | | | | | | |
| | s from the reporting fou | | | | | | | | | | | l |
| | h | | | | | | | | | 1a(1) | | No |
| | erassets | | | | | | | | | 1a(2) | | No |
| b Other tra | | | 4 | | _ | | | | | 41.74 | | |
| | es of assets to a noncha | | | | | | | | | | | No |
| | chases of assets from a | | | | | | | | | | | No |
| | tal of facilities, equipme | | | | | | | | | 1b(3) | | No No |
| | nbursement arrangeme ns or loan guarantees. | | | | | | | | | 1b(5) | | No |
| | rmance of services or r | | | | | | | | | 1b(6) | | No |
| | of facilities, equipment, | | | | | | | | | ─ | | No |
| d If the and of the go | swer to any of the above ods, other assets, or se ansaction or sharing arr | e is "Yes," ervices giv angement | compl en by t , show | ete the fol the reporti in column | llowing schedule ng foundation I | Colum f the fou the god | nn (b) sho undation r ods, other | uld always show the ceived less than assets, or service | he fair ma fair marke es receive | rket va et value ed | 1 | |
| (a) Line No | (b) Amount involved | (c) Name | OI HOTIC | паптаріе ехе | empt organization | (a) | Description | of transfers, transaction | ons, and sna | illig alla | ngemer | its |
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| describe | undation directly or indi d in section 501(c) of t complete the following (a) Name of organizatio | he Code (c schedule | | nan sectio | · | ın sectı | - | - | | . 厂 Y∈ | s F | , No |
| | | | | | | | | | | | | |
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| the | der penalties of perjury, best of my knowledge a prmation of which prepa ****** | and belief, | ıt ıs tr | ue, correc | | | | | May the return with the | | sed on | all |
| | Signature of officer or t | rustee | | | Date | , | Title | | below (see inst | tr)? 🔽 <u>\</u> | ∕es | No |
| | Print/Type preparer's ERIC WYDRA | name | Prepa | arer's Sıgn | ature | Date | | Check if self- employed ▶ | PTIN P(| 000537 | 779 | |
| Paid Preparer Use | | LLC | l | | | ı | | Firm's EIN ► 38 | -135795 | 1 | | |
| Only | Firm's address F PO BOX 307 SOUT | HEIELD M | 11 420 | 1370307 | | | | Phone no (248) | 1352-250 |) () | | |
| | 10 50 8 30 7 30 0 11 | ILLU, I ^v | 11 400 | , | | | | Thone ip (248) | , 552-250 | , 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 | Foundation status of | Purpose of grant or contribution | A mount |
|--|---|-------------------------|----------------------------------|---------|
| Name and address (home or business) | any foundation manager or substantial contributor | recipient | | |
| a Paid during the year | | | | |
| ALZHEIMER'S ASSOCIATION 20300 CIVIC CENTER DRIVE 100 SOUTHFIELD,MI 48076 | NONE | PC | RESEARCH | 600 |
| AMERICAN JEWISH JOINT DISTRIBUTION 711 3RD AVE NEW YORK,NY 10017 | NONE | PC | RESEARCH | 25,000 |
| ANN ARBOR ACADEMY 111 EAST MOSELY ANN ARBOR,MI 48104 | NONE | PC | EDUCATION | 1,000 |
| BIRTHRIGHT ISRAEL FOUNDATION 33 EAST 33RD STREET 7TH FLOOR NEW YORK,NY 10016 | NONE | PC | EDUCATION | 10,000 |
| CAMP MAK-A-DREAM MICHIGAN CHAPTER 121 W LONG LAKE ROAD SUITE 120 BLOOMFIELD HILLS,MI 48304 | NONE | PC | CHARITY | 500 |
| CAMPAIGN FOR TOBACCO-FREE KIDS 1400 EYE STREET NW SUITE 1200 WASHINGTON DC, DC 20005 | NONE | PC | EDUCATION | 2,000 |
| CENTRAL PARK CONSERVANCY 14 EAST 60TH STREET 8TH FLOOR NEW YORK,NY 10022 | NONE | PC | CHARITY | 125 |
| CITY MEALS ON WHEELS 335 LEXINGTON AVE NEW YORK, NY 10017 | NONE | PC | CHARITY | 334 |
| COGNITIVE NEUROLOGY & ALZHEIMER'S DISEASE CENTER 320 EAST SUPERIOR STREET RM 1- 453 CHICAGO,IL 60611 | NONE | PC | CHARITY | 100 |
| COLUMBIA GRAMMAR & PREPARATORY SCHOOL 5 WEST 93RD STREET NEW YORK,NY 10025 | NONE | PC | EDUCATION | 5,000 |
| CONGREGATION OF EVERYONE 26398 CRESTWOOD DRIVE NOVI,MI 48374 | NONE | PC | CHARITY | 1,000 |
| THE EMPOWERMENT PLAN 1401 VERMONT STREET DETROIT,MI 48216 | NONE | PC | CHARITY | 6,000 |
| FLORIDA ATLANTIC UNIVERSITY FOUNDATION INC 777 GLADES ROAD BOCA RATON,FL 33431 | NONE | PC | EDUCATION | 3,000 |
| FRIENDS OF THE ISRAEL DEFENSE FORCES PO BOX 999 WALLED LAKE, MI 48390 | NONE | PC | CHARITY | 1,000 |
| HEBREW FREE LOAN 6735 TELEGRAPH ROAD SUITE 300 BLOOMFIELD HILLS,MI 48301 | NONE | PC | CHARITY | 10,000 |
| Total | | | | 405,609 |

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

| | | <u> </u> | ne rear or Approved for i | |
|---|---|-------------------------|----------------------------------|---------|
| Recipient | If recipient is an individual, show any relationship to | Foundation status of | Purpose of grant or contribution | A mount |
| Name and address (home or business) | any foundation manager or substantial contributor | recipient | | |
| a Paid during the year | | | | |
| HOLOCAUST MEMORIAL CENTER 28123 ORCHARD LAKE ROAD FARMINGTON HILLS,MI 48334 | NONE | PC | CHARITY | 500 |
| JARC 30301 NORTHWESTERN HWY SUITE 100 FARMINGTON HILLS,MI 48334 | NONE | PC | DISABLED | 11,500 |
| JVS 29699 SOUTHFIELD ROAD SOUTHFIELD,MI 48076 | NONE | PC | CHARITY | 1,000 |
| JEWISH FEDERATION OF METRO DETROIT 6735 TELEGRAPH ROAD BLOOMFIELD HILLS,MI 483032030 | NONE | PC | CHARITY | 230,200 |
| JEWISH FEDERATION OF PALM BEACH 4601 COMMUNITY DRIVE WEST PALM BEACH, FL 33417 | NONE | PC | CHARITY | 12,500 |
| JEWISH HOSPICE & CHAPLAINCY NETWORK 6555 W MAPLE ROAD WEST BLOOMFIELD,MI 48322 | NONE | PC | CHARITY | 12,600 |
| JIMMY'S KIDS PO BOX 150 CLAWSON,MI 48017 | NONE | PC | CHARITY | 2,000 |
| KADIMA 15999 WTWELVE MILE RD SOUTHFIELD,MI 48076 | NONE | PC | CHARITY | 5,000 |
| KARMANOS CANCER INSTITUTE 4100 JOHN R DETROIT, MI 48201 | NONE | PC | CHARITY | 1,000 |
| MAKE-A-WISH FOUNDATION 6230 CARROLL DR WEST BLOOMFIELD,MI 48322 | NONE | PC | CHARITY | 500 |
| MICHIGAN PSYCHOANALYTIC FOUNDATION 32841 MIDDLEBELT RD SUITE 411 FARMINGTON HILLS,MI 48334 | NONE | PC | EDUCATION | 2,000 |
| ORT AMERICA 75 MAIDEN LANE NEW YORK,NY 10038 | NONE | PC | EDUCATION | 1,800 |
| RICHARD TUCKER MUSIC FOUNDATION 1790 BROADWAY SUITE 715 NEW YORK,NY 10019 | NONE | PC | CHARITY | 1,500 |
| SKY FOUNDATION INC 33 BLOOMFIELD HILLS PARKWAY SUITE 130 BLOOMFIELD HILLS,MI 48304 | NONE | PC | CHARITY | 6,000 |
| SYRACUSE UNIVERSITY 721 UNIVERSITY AVENUE SUITE 415 SYRACUSE,NY 13244 | NONE | PC | EDUCATION | 1,000 |
| Total | | | | 405,609 |

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 | Foundation status of | Purpose of grant or contribution | Amount |
|--|---|-------------------------|----------------------------------|---------|
| Name and address (home or business) | any foundation manager or substantial contributor | recipient | | |
| a Paid during the year | | | | |
| TEMPLE BETH EL 2815 N FLAGLER DRIVE WEST PALM BEACH,FL 33407 | NONE | PC | CHARITY | 1,900 |
| TEMPLE ISRAEL 5725 WALNUT LAKE RD WEST BLOOMFIELD,MI 48323 | NONE | PC | CHARITY | 3,850 |
| U OF M - HILLEL 1429 HILL ST ANN ARBOR,MI 48104 | NONE | PC | EDUCATION | 1,000 |
| U OF M - MICHIGAN ATHLETICS THE GREGORY RICHARDS '92 MEMORIAL SCHOLARSHIP 1000 SOUTH STATE STREET ANN ARBOR,MI 48109 | NONE | PC | EDUCATION | 10,000 |
| UNIVERSITY OF MICHIGAN 3003 SOUTH STATE STREET SUITE 8000 ANN ARBOR,MI 48109 | NONE | PC | EDUCATION | 1,100 |
| UNIVERSITY OF SOUTHERN CALIFORNIA 650 WEST 35TH STREET SUITE 114 LOS ANGELES,CA 90089 | NONE | PC | EDUCATION | 5,000 |
| UNITED WAY 660 WOODWARD AVENUE SUITE 300 DETROIT,MI 48226 | NONE | PC | CHARITY | 10,000 |
| UNITED WAY OF PALM BEACH 44 COCOANUT ROW M-201 PALM BEACH,FL 33480 | NONE | PC | COMMUNITY SERVICES | 500 |
| WORLD OF CHILDREN 11501 DUBLIN BLVD STE 200 DUBLIN,CA 94568 | NONE | PC | EDUCATION | 10,000 |
| YAD EZRA 2850 W 11 MILE RD BERKLEY, MI 48072 | NONE | PC | CHARITY | 7,500 |
| Total | | | ▶ 3a | 405,609 |

TY 2014 Accounting Fees Schedule

Name: MURRAY C AND INA C PITT CHARITABLE TRUST

| Category | Amount | Net Investment Income | Adjusted Net Income | Disbursements for Charitable Purposes |
|---------------------|--------|--------------------------|------------------------|---|
| TAX PREPARATION | 2,200 | 1,100 | 0 | 1,100 |
| INVESTMENT ADVISORY | 10,000 | 5,000 | 0 | 5,000 |

| effie GRAPHIC | print - DO NOT PROCESS | AS Filed Data - | DLN: 93491109001046 |
|---------------|------------------------|-----------------|---------------------|
| | | | |
| | | | |

TY 2014 Investments Corporate Stock Schedule

Name: MURRAY C AND INA C PITT CHARITABLE TRUST

| Name of Stock | End of Year Book Value | End of Year Fair Market Value |
|----------------|---------------------------|----------------------------------|
| CHARLES SCHWAB | 1,285,273 | 1,256,631 |

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TY 2014 Investments - Other Schedule

Name: MURRAY C AND INA C PITT CHARITABLE TRUST

| Category/ Item | Listed at Cost or FMV | Book Value | End of Year Fair Market Value |
|--------------------------|-----------------------|------------|----------------------------------|
| NET CASH VALUE INSURANCE | AT COST | 89,560 | 89,560 |
| ANNUITY | AT COST | 809,782 | 809,782 |

TY 2014 Other Expenses Schedule

Name: MURRAY C AND INA C PITT CHARITABLE TRUST

| Description | Revenue and Expenses per Books | Net Investment Income | Adjusted Net Income | Disbursements for Charitable Purposes |
|-----------------|--------------------------------|--------------------------|---------------------|--|
| PREMIUM EXPENSE | 91,798 | 0 | 0 | 0 |

TY 2014 Other Income Schedule

Name: MURRAY C AND INA C PITT CHARITABLE TRUST

| Description | Revenue And Expenses Per Books | Net Investment Income | Adjusted Net Income |
|--------------------------------|-----------------------------------|--------------------------|---------------------|
| SECTION 72 ANNUITY INCOME | 194,856 | 194,856 | 0 |
| LIFE INS PROCEEDS - NONTAXABLE | 1,100,000 | | 1,100,000 |

TY 2014 Taxes Schedule

Name: MURRAY C AND INA C PITT CHARITABLE TRUST

| Category | Amount | Net Investment Income | Adjusted Net Income | Disbursements for Charitable Purposes |
|--------------------|--------|--------------------------|------------------------|---|
| INCOME TAX EXPENSE | 11,801 | 0 | 0 | 0 |