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Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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▶ Information about Form 990-PF and its instructions is at www.irs.gov/form990pf.

OMB No 1545-0052

2014

Open to Public Inspection

For calendar year 2014, or tax year beginning 12-01-2014 , and ending 11-30-2015

Name of foundation HALLE FAMILY FOUNDATION INC C/O EDWARD A HALLE JR ESQ		A Employer identification number 52-6038453	
Number and street (or P O box number if mail is not delivered to street address) 4081 MT ZION ROAD		B Telephone number (see instructions) (410) 771-9900	
City or town, state or province, country, and ZIP or foreign postal code UPPERCO, MD 211559328		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16)▶\$ 1,692,379		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	
J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)			

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)				
	2 Check ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities.	3,017	3,017		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	23,871			
	b Gross sales price for all assets on line 6a 23,871				
	7 Capital gain net income (from Part IV, line 2) . . .		23,871		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	141	141		
	12 Total. Add lines 1 through 11	27,029	27,029		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0	0		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	2,200	1,100		1,100
	c Other professional fees (attach schedule)	13,538	13,538		0
	17 Interest				
	18 Taxes (attach schedule) (see instructions) . . .				
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	36	0		36
	24 Total operating and administrative expenses. Add lines 13 through 23	15,774	14,638		1,136
	25 Contributions, gifts, grants paid	92,550			92,550
	26 Total expenses and disbursements. Add lines 24 and 25	108,324	14,638		93,686
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-81,295			
	b Net investment income (if negative, enter -0-)		12,391		
	c Adjusted net income (if negative, enter -0-)				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	2,367	8,323	8,323
	2	Savings and temporary cash investments	8,139	8,139	8,139
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)			
	c	Investments—corporate bonds (attach schedule).			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	1,222,217	1,134,966	1,675,917
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15	Other assets (describe ▶ _____)				
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	1,232,723	1,151,428	1,692,379	
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)	0	0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds	1,232,723	1,151,428	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
	29	Retained earnings, accumulated income, endowment, or other funds	0	0	
30	Total net assets or fund balances (see instructions)	1,232,723	1,151,428		
31	Total liabilities and net assets/fund balances (see instructions) . . .	1,232,723	1,151,428		

Part III Analysis of Changes in Net Assets or Fund Balances		
1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year’s return)	11,232,723
2	Enter amount from Part I, line 27a	-81,295
3	Other increases not included in line 2 (itemize) ▶ _____	0
4	Add lines 1, 2, and 3	1,151,428
5	Decreases not included in line 2 (itemize) ▶ _____	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	1,151,428

Part IV

Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1 a	GAIN FROM ASSOCIATED ACCOUNT	P		
b				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 23,871			23,871
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(I) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a			23,871
b			
c			
d			
e			

2	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	23,871
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8	}	3	

Part V

Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)

If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2013	87,462	1,867,339	0 046838
2012	70,948	1,729,932	0 041012
2011	71,951	1,607,268	0 044766
2010	97,338	1,654,328	0 058838
2009	21,675	1,489,267	0 014554

2	Total of line 1, column (d).	2	0 206008
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0 041202
4	Enter the net value of noncharitable-use assets for 2014 from Part X, line 5.	4	1,782,193
5	Multiply line 4 by line 3.	5	73,430
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	124
7	Add lines 5 and 6.	7	73,554
8	Enter qualifying distributions from Part XII, line 4.	8	93,686

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1		
	Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b	1	124
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0
3	Add lines 1 and 2.	3	124
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	124
6	Credits/Payments		
a	2014 estimated tax payments and 2013 overpayment credited to 2014	6a	258
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	258
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached.	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	134
11	Enter the amount of line 10 to be Credited to 2015 estimated tax ☐ 134 Refunded ☐	11	0

Part VII-AStatements Regarding Activities

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

Part VII-A

Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address N/A				
14	The books are in care of EDWARD A HALLE JR ESQ Telephone no (410) 771-9900 Located at 4081 MT ZION ROAD UPPERCO MD ZIP+4 211559328			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here and enter the amount of tax-exempt interest received or accrued during the year.	15		
16	At any time during calendar year 2014, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	Yes	No
See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes", enter the name of the foreign country				

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

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

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a

During the year did the foundation pay or incur any amount to

(1)

Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

YesNo

(2)

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

YesNo

(3)

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

YesNo

(4)

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

YesNo

(5)

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

YesNo

b

If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

5b

Organizations relying on a current notice regarding disaster assistance check here.

c

If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

YesNo

If "Yes," attach the statement required by Regulations section 53.4945–5(d).

6a

Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

YesNo

b

Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

6b

No

If "Yes" to 6b, file Form 8870.

7a

At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

YesNo

b

If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

7b

Part VIII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1

List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
ELLEN HALLE	PRESIDENT	0	0	0
4081 MT ZION ROAD UPPERCO, MD 211559328	1 00			
EDWARD A HALLE JR	VICE PRESIDENT & SECRETARY	0	0	0
4081 MT ZION ROAD UPPERCO, MD 211559328	1 00			
JAN S HALLE	VICE PRESIDENT	0	0	0
4081 MT ZION ROAD UPPERCO, MD 211559328	1 00			
JAMES S HALLE	TREASURER	0	0	0
4081 MT ZION ROAD UPPERCO, MD 211559328	1 00			

2

Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Total number of other employees paid over \$50,000.

0

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Part VIII

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

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services.		0

Part IX-A

Summary of Direct Charitable Activities

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

Part IX-B

Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3.	0

Part X

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	1,803,117
b	Average of monthly cash balances.	1b	6,216
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	1,809,333
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	1,809,333
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	27,140
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	1,782,193
6	Minimum investment return. Enter 5% of line 5.	6	89,110

Part XI

Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6.	1	89,110
2a	Tax on investment income for 2014 from Part VI, line 5.	2a	124
b	Income tax for 2014 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	124
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	88,986
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	88,986
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	88,986

Part XII

Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26.	1a	93,686
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	93,686
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	124
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	93,562
Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years			

Part XIII

Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2013	(c) 2013	(d) 2014
1 Distributable amount for 2014 from Part XI, line 7				88,986
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only.			84,576	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2014				
a From 2009.				
b From 2010.				
c From 2011.				
d From 2012.				
e From 2013.				
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2014 from Part XII, line 4 ▶ \$ 93,686				
a Applied to 2013, but not more than line 2a			84,576	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2014 distributable amount.				9,110
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0			
b Prior years' undistributed income Subtract line 4b from line 2b.		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 2013 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2014 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015				79,876
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions). . .	0			
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a	0			
10 Analysis of line 9				
a Excess from 2010. . . .				
b Excess from 2011. . . .				
c Excess from 2012. . . .				
d Excess from 2013. . . .				
e Excess from 2014. . . .				

Part XIV

4942(j)(3) or 4942(j)(5)

3 Complete 3a, b, or c for the alternative test relied upon

1 Information Regarding Foundation Managers:

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

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

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

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

Part XV

Supplementary Information (continued)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i> See Additional Data Table				
Total			3a	92,550
b <i>Approved for future payment</i>				
Total			3b	0

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2014)

Part XVII

l Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		Yes	No
a Transfers from the reporting foundation to a noncharitable exempt organization of			
(1) Cash.		1a(1)	No
(2) Other assets.		1a(2)	No
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization.		1b(1)	No
(2) Purchases of assets from a noncharitable exempt organization.		1b(2)	No
(3) Rental of facilities, equipment, or other assets.		1b(3)	No
(4) Reimbursement arrangements.		1b(4)	No
(5) Loans or loan guarantees.		1b(5)	No
(6) Performance of services or membership or fundraising solicitations.		1b(6)	No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.		1c	No
d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received			

[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Sign Here	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.		
	***** _____ Signature of officer or trustee	2016-10-07 _____ Date	 ***** _____ Title May the IRS discuss this return with the preparer shown below (see instr)? ☒ Yes ☐ No

Paid Preparer Use Only	Print/Type preparer's name JOSEPH A LIBERMAN CPA	Preparer's Signature	Date	Check if self-employed ☒	PTIN P00087382
	Firm's name ☒ GORFINE SCHILLER & GARDYN PA			Firm's EIN ☒ 52-1231901	
	Firm's address ☒ 10045 RED RUN BLVD SUITE 250 OWINGS MILLS, MD 21117			Phone no (410) 356-5900	

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
AMERICAN HEART ASSOCIATION 23RD FLOOR 217 E REDWOOD ST BALTIMORE,MD 21201	NONE	PUBLIC CHARITY	GENERAL	50
B'MORE CLUBHOUSE INC 5 E READ STREET BALTIMORE,MD 21202	NONE	PUBLIC CHARITY	GENERAL	2,000
BALTIMORE CLAYWORKS 5707 SMITH AVENUE BALTIMORE,MD 21209	NONE	PUBLIC CHARITY	GENERAL	100
BALTIMORE COMMUNITY FOUNDATION 2 E READ STREET BALTIMORE,MD 21202	NONE	PUBLIC CHARITY	GENERAL	1,000
BALTIMORE SCHOOL FOR THE ARTS FOUNDATION 712 CATHEDRAL STREET BALTIMORE,MD 21201	NONE	PUBLIC CHARITY	GENERAL	1,500
BALTIMORE SQUASHWISE INC 3600 CLIPPER MILL ROAD 107 BALTIMORE,MD 21211	NONE	PUBLIC CHARITY	GENERAL	1,000
BARNARD COLLEGE 3009 BROADWAY NEWYORK,NY 10027	NONE	SCHOOL	GENERAL	1,000
BROWN UNIVERSITY PO BOX 1893 PROVIDENCE,RI 01912	NONE	SCHOOL	GENERAL	500
CHATHAM OUTREACH ALLIANCE INC - CORA FOOD PANTRY PO BOX 1326 PITTSBORO,NC 27312	NONE	PUBLIC CHARITY	GENERAL	1,000
CHESAPEAKE BAY FOUNDATION 6 HERNDON AVENUE ANNAPOLIS,MD 21403	NONE	PUBLIC CHARITY	GENERAL	4,000
COOL KIDS CAMPAIGN FOUNDATION INC 8422 BELLONA LANE 102 TOWSON,MD 21204	NONE	PUBLIC CHARITY	GENERAL	250
ENOCH PRATT FREE LIBRARY 400 CATHEDRAL STREET BALTIMORE,MD 21201	NONE	PUBLIC CHARITY	GENERAL	1,000
FILL YOUR BUCKET LIST FOUNDATION 304 SOUTHGLEN DRIVE CARY,NC 27518	NONE	PUBLIC CHARITY	GENERAL	1,500
FORMAN SCHOOL INC PO BOX 80 LITCHFIELD,CT 06759	NONE	SCHOOL	GENERAL	2,000
GARRISON FOREST SCHOOL 300 GARRISON FOREST ROAD OWINGS MILLS,MD 21117	NONE	SCHOOL	GENERAL	1,000
Total  3a				92,550

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
GAY AND LESBIAN VICTORY INSTITUTE 1133 15TH STREET NW 350 WASHINGTON,DC 20005	NONE	PUBLIC CHARITY	GENERAL	150
GLSEN BALTIMORE 1111 N CHARLES STREET 4TH FLOOR BALTIMORE,MD 21201	NONE	PUBLIC CHARITY	GENERAL	1,000
HABITAT FOR HUMANITY PO BOX 1729 AMERICUS,GA 31709	NONE	PUBLIC CHARITY	GENERAL	1,000
HABITAT FOR HUMANITY ORANGE COUNTY NC INC 88 VILCOM CENTER DRIVE L110 CHAPEL HILL,NC 27514	NONE	PUBLIC CHARITY	GENERAL	1,000
HARLEM CHILDREN'S ZONE 35 EAST 125TH STREET NEWYORK,NY 10035	NONE	PUBLIC CHARITY	GENERAL	1,000
HOPEWELL CANCER SUPPORT PO BOX 755 BROOKLANDVILLE,MD 21022	NONE	PUBLIC CHARITY	GENERAL	1,000
INTERFAITH POWER & LIGHT 369 PINE STREET 700 SAN FRANCISCO,CA 94104	NONE	PUBLIC CHARITY	GENERAL	100
IRVINE NATURE CENTER 11201 GARRISON FOREST ROAD OWINGS MILLS,MD 21117	NONE	PUBLIC CHARITY	GENERAL	2,000
JHPIEGO CORPORATION 1615 THAMES STREET BALTIMORE,MD 21231	NONE	PUBLIC CHARITY	GENERAL	1,000
JOHNS HOPKINS HOSPITAL 401 NORTH BROADWAY BALTIMORE,MD 21205	NONE	PUBLIC CHARITY	GENERAL	4,000
JOHNS HOPKINS UNIVERSITY - PEABODY INSTITUTE 750 E PRATT STREET 1709 BALTIMORE,MD 21202	NONE	SCHOOL	GENERAL	1,000
KIPPUJIMA VILLAGE ACADEMY 4701 GREENSPRING AVENUE115 BALTIMORE,MD 21209	NONE	PUBLIC CHARITY	GENERAL	1,000
LAND TRUST ALLIANCE INC 1660 L STREET NW WASHINGTON,DC 20036	NONE	PUBLIC CHARITY	GENERAL	1,000
LIVING CLASSROOMS FOUNDATION 802 S CAROLINE STREET BALTIMORE,MD 21231	NONE	PUBLIC CHARITY	GENERAL	2,000
MARYLAND FOOD BANK 2200 HALETHORPE FARMS ROAD BALTIMORE,MD 21297	NONE	PUBLIC CHARITY	GENERAL	500
Total  3a				92,550

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
MARYLAND FOOD BANK - LAWYERS CAMPAIGN AGAINST HUNGER 2200 HALETHORPE FARMS ROAD BALTIMORE,MD 21227	NONE	PUBLIC CHARITY	GENERAL	250
MARYLAND HUMANITIES COUNCIL INC 108 W CENTRE STREET BALTIMORE,MD 21201	NONE	PUBLIC CHARITY	GENERAL	1,000
MIDDLEBURY COLLEGE 700 EXCHANGE STREET MIDDLEBURY,VT 05753	NONE	SCHOOL	GENERAL	500
MPT FOUNDATION INC 11767 OWINGS MILLS BLVD OWINGS MILLS,MD 21117	NONE	PUBLIC CHARITY	GENERAL	250
MULTIPLE SCLEROSIS ASSOCIATION OF AMERICA INC 706 HADDONFIELD ROAD CHERRY HILL,NJ 08002	NONE	PUBLIC CHARITY	GENERAL	1,000
MULTIPLE SCLEROSIS FOUNDATION INC 6520 N ANDREWS AVENUE FT LAUDERDALE,FL 33309	NONE	PUBLIC CHARITY	GENERAL	500
THE NATURE CONSERVANCY 4245 NORTH FAIRFAX DRIVE ARLINGTON,VA 22203	NONE	PUBLIC CHARITY	GENERAL	1,000
NEW ENGLAND COLLEGE 98 BRIDGE STREET HENNIKER,NH 03242	NONE	SCHOOL	GENERAL	2,100
NORTH CAROLINA WASTE AWARENESS & REDUCTION NETWORK PO BOX 61051 DURHAM,NC 27715	NONE	PUBLIC CHARITY	GENERAL	5,000
ORANGE COUNTY PARTNERSHIP FOR YOUNG CHILDREN INC 120 PROVIDENCE ROAD 101 CHAPEL HILL,NC 27514	NONE	PUBLIC CHARITY	GENERAL	1,500
PAN MASS CHALLENGE 77 FOURTH AVE NEEDHAM,MA 02494	NONE	PUBLIC CHARITY	GENERAL	500
PAUL'S PLACE 1118 WARD STREET BALTIMORE,MD 21230	NONE	PUBLIC CHARITY	GENERAL	2,000
PIEDMONT ENVIRONMENTAL COUNCIL INC PO BOX 460 WARRENTON,VA 20188	NONE	PUBLIC CHARITY	GENERAL	250
PLANNED PARENTHOOD OF CENTRAL NORTH CAROLINA PO BOX 3258 CHAPEL HILL,NC 27515	NONE	PUBLIC CHARITY	GENERAL	4,000
PLANNED PARENTHOOD OF MARYLAND 330 N HOWARD STREET BALTIMORE,MD 21201	NONE	PUBLIC CHARITY	GENERAL	1,000
Total  3a				92,550

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
RANGELEY LAKES HERITAGE TRUST INC PO BOX 249 OQUOSSOC,ME 04964	NONE	PUBLIC CHARITY	GENERAL	2,000
RANGELEY LIBRARY ASSOCIATION PO BOX 381 RANGELEY,ME 04970	NONE	PUBLIC CHARITY	GENERAL	500
RECORDING FOR THE BLIND & DYSLEXIC INC 20 ROSZEL ROAD PRINCETON,NJ 08540	NONE	PUBLIC CHARITY	GENERAL	2,000
SISTERS ACADEMY OF BALTIMORE INC 139 FIRST AVENUE BALTIMORE,MD 21227	NONE	PUBLIC CHARITY	GENERAL	1,000
ST FRANCES ACADEMY 501 E CHASE STREET BALTIMORE,MD 21202	NONE	PUBLIC CHARITY	GENERAL	500
TABLE MINISTRIES INC 205 WEST WEAVER STREET CARRBORO,NC 27510	NONE	PUBLIC CHARITY	GENERAL	2,000
TAYLOR FOUNDATION 221 TURKEY PATH BUCKSPORT,ME 04416	NONE	PUBLIC CHARITY	GENERAL	250
THE LADEW GARDENS INC 3535 JARRETTSVILLE PIKE MONKTON,MD 21111	NONE	PUBLIC CHARITY	GENERAL	1,000
THE PARK SCHOOL 2425 OLD COURT ROAD PIKESVILLE,MD 21208	NONE	SCHOOL	GENERAL	3,000
THE WOOSTER FUND 1189 BEALL AVENUE WOOSTER,OH 44691	NONE	PUBLIC CHARITY	GENERAL	1,000
TUFTS UNIVERSITY SCHOOL OF MEDICINE 136 HARRISON AVENUE BOSTON,MA 02111	NONE	SCHOOL	GENERAL	1,000
UNIVERSITY OF BALTIMORE FOUNDATION 1130 N CHARLES STREET BALTIMORE,MD 21201	NONE	SCHOOL	GENERAL	1,000
V-LINC 2301 ARGONNE DRIVE BALTIMORE,MD 21218	NONE	PUBLIC CHARITY	GENERAL	250
VALLEYS PLANNING COUNCIL INC PO BOX 5402 TOWSON,MD 21285	NONE	PUBLIC CHARITY	GENERAL	1,000
WATERKEEPER ALLIANCE INC - FUTALEUFU RIVERKEEPER 17 BATTERY PLACE1329 NEW YORK,NY 10004	NONE	PUBLIC CHARITY	GENERAL	3,000
Total  3a				92,550

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
WYPR RADIO 2216 N CHARLES STREET BALTIMORE,MD 21218	NONE	PUBLIC CHARITY	GENERAL	1,000
YOUNG AUDIENCES OF MARYLAND INC 2600 N HOWARD STREET 1300 BALTIMORE,MD 21218	NONE	PUBLIC CHARITY	GENERAL	1,000
GOUGH UNITED METHODIST CHURCH 14200 CUBA ROAD COCKEYSVILLE,MD 21030	NONE	PUBLIC CHARITY	GENERAL	50
CHAPEL HILL & CARRBORO HUMAN RIGHTS CENTER 107 BARNES STREET CARRBORO,NC 27510	NONE	PUBLIC CHARITY	GENERAL	2,000
HUMAN RIGHTS CENTER OF CARRBORO PO BOX 3036 CHAPEL HILL,NC 27515	NONE	PUBLIC CHARITY	GENERAL	500
IMMERSION FOR SPANISH LANGUAGE ACQUISITION PO BOX 16278 CHAPEL HILL,NC 27516	NONE	PUBLIC CHARITY	GENERAL	2,000
WTMD 1 OLYMPIC PLACE SUITE 100 TOWSON,MD 21204	NONE	PUBLIC CHARITY	GENERAL	1,000
MACULAR DEGENERATION RESEARCH 22512 GATEWAY CENTER DRIVE CLARKSBURG,MD 20871	NONE	PUBLIC CHARITY	GENERAL	1,000
UNIVERSITY OF BALTIMORE BUSINESS SCHOOL 11 WMTROYAL AVE BALTIMORE,MD 21201	NONE	SCHOOL	GENERAL	1,000
SHERIDAN ARTS FOUNDATION PO BOX 2680 TELLURIDE,CO 81435	NONE	PUBLIC CHARITY	GENERAL	1,000
GUTIERREZ MEMORIAL FOUNDATION PO BOX 4773 BALTIMORE,MD 21211	NONE	PUBLIC CHARITY	GENERAL	1,000
UNIVERSITY OF WISCONSON-GLOBAL HEALTH ANNUAL FUND 1710 UNIVERSITY AVE MADISON,WI 53726	NONE	SCHOOL	GENERAL	2,000
R ADAMS COWLEY SHOCK TRAUMA CENTER 22 S GREENE STREET BALTIMORE,MD 21201	NONE	PUBLIC CHARITY	GENERAL	1,000
SHERPA'S FUND - AMERICAN HIMALAYAN FOUNDATION 909 MONTGOMERY STREET STE 400 SAN FRANCISCO,CA 94133	NONE	PUBLIC CHARITY	GENERAL	2,000
Total ▶ 3a				92,550

TY 2014 Accounting Fees Schedule**Name:** HALLE FAMILY FOUNDATION INC

C/O EDWARD A HALLE JR ESQ

EIN: 52-6038453

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	2,200	1,100		1,100

TY 2014 Investments - Other Schedule

Name: HALLE FAMILY FOUNDATION INC

C/O EDWARD A HALLE JR ESQ

EIN: 52-6038453

Category / Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
THE ASSOCIATED:INTEREST IN THE CONSOLIDATED INVETMENT FUND	AT COST	1,134,966	1,675,917

TY 2014 Other Expenses Schedule

Name: HALLE FAMILY FOUNDATION INC

C/O EDWARD A HALLE JR ESQ

EIN: 52-6038453

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PNC BANK FEES	36	0		36

TY 2014 Other Income Schedule

Name: HALLE FAMILY FOUNDATION INC
C/O EDWARD A HALLE JR ESQ
EIN: 52-6038453

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
OTHER INCOME	141	141	141

TY 2014 Other Professional Fees Schedule

Name: HALLE FAMILY FOUNDATION INC
C/O EDWARD A HALLE JR ESQ
EIN: 52-6038453

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
THE ASSOCIATED ADMINISTRATION FEES	13,538	13,538		0