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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

2015

Open to Public Inspection

For calendar year 2015, or tax year beginning 01-01-2015, and ending 12-31-2015

Name of foundation THE SHORELAND FOUNDATION		A Employer identification number 11-3241828	
Number and street (or P O box number if mail is not delivered to street address) 38 CAMEL HOLLOW ROAD		Room/suite	B Telephone number (see instructions) (631) 351-0961
City or town, state or province, country, and ZIP or foreign postal code LLOYD HARBOR, NY 11743			
G Check all that apply <div><input type="checkbox"/> Initial return<input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return<input type="checkbox"/> Amended return <input type="checkbox"/> Address change<input type="checkbox"/> Name change</div>		D 1. Foreign organizations, check here 2. Foreign organizations meeting the 85% test, check here and attach computation	
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> 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) \$ 30,659,098		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here	
J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)			

Part I Analysis of Revenue and Expenses <i>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))</i>		Revenue and expenses per books (a)	Net investment income (b)	Adjusted net income (c)	Disbursements for charitable purposes (d) (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)				
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	22	22		
	4 Dividends and interest from securities	155,781	155,781		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	1,770,210			
	b Gross sales price for all assets on line 6a 9,439,772				
	7 Capital gain net income (from Part IV, line 2) . . .		1,770,210		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	1,095	1,095	0	
	12 Total. Add lines 1 through 11	1,927,108	1,927,108	0	
	13 Compensation of officers, directors, trustees, etc	0	0	0	0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule).				
	b Accounting fees (attach schedule).	27,696	5,539	0	22,157
	c Other professional fees (attach schedule)				
	17 Interest	48,779	48,779	0	0
	18 Taxes (attach schedule) (see instructions) . . .	40,736	6,591	0	0
	19 Depreciation (attach schedule) and depletion . .				
	20 Occupancy				
	21 Travel, conferences, and meetings.				
	22 Printing and publications				
	23 Other expenses (attach schedule).	17,449	1,720	0	15,729
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	134,660	62,629	0	37,886
	25 Contributions, gifts, grants paid	5,613,053			5,613,053
	26 Total expenses and disbursements. Add lines 24 and 25	5,747,713	62,629	0	5,650,939
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-3,820,605			
	b Net investment income (if negative, enter -0-)		1,864,479		
	c Adjusted net income (if negative, enter -0-) . . .			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	21,386	102,275	102,275
	2	Savings and temporary cash investments	25,028	25,030	25,030
	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)	10,545,614	9,253,985	12,921,488
	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)	11,647,193	9,121,634	12,060,305	
14	Land, buildings, and equipment basis ▶ _____ 2,940				
	Less accumulated depreciation (attach schedule) ▶ 2,940				
15	Other assets (describe ▶ _____)	1,283,102	1,283,102	5,550,000	
16	Total assets(to be completed by all filers—see the instructions Also, see page 1, item I)	23,522,323	19,786,026	30,659,098	
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 ▶ _____)	3,500,000	3,500,000	
	23	Total liabilities(add lines 17 through 22)	3,500,000	3,500,000	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> 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 ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds	0	0	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
	29	Retained earnings, accumulated income, endowment, or other funds	20,022,323	16,286,026	
	30	Total net assets or fund balances(see instructions)	20,022,323	16,286,026	
31	Total liabilities and net assets/fund balances(see instructions)	23,522,323	19,786,026		

Part III Analysis of Changes in Net Assets or Fund Balances			
1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year’s return)	1	20,022,323
2	Enter amount from Part I, line 27a	2	-3,820,605
3	Other increases not included in line 2 (itemize) ▶ _____	3	84,308
4	Add lines 1, 2, and 3	4	16,286,026
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)—Part II, column (b), line 30	6	16,286,026

Part IV

Capital Gains and Losses for Tax on Investment Income

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

(e) Gross sales price	Depreciation allowed (f) (or allowable)	Cost or other basis (g) plus expense of sale	Gain or (loss) (h) (e) plus (f) minus (g)
a 8,330,956		7,669,562	661,394
b 1,108,816			1,108,816
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			Gains (Col (h) gain minus col (k), but not less than -0-) or (l) Losses (from col (h))
(i) F M V as of 12/31/69	Adjusted basis (j) as of 12/31/69	Excess of col (i) (k) over col (j), if any	
a			661,394
b			1,108,816
c			
d			
e			

2	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	1,770,210
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))
2014	2,083,135	33,972,573	0 061318
2013	5,401,380	28,402,610	0 190172
2012	5,698,233	31,012,318	0 183741
2011	2,246,007	19,518,342	0 115072
2010	2,387,369	12,445,953	0 191819

2	Total of line 1, column (d).	2	0 742122
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 148424
4	Enter the net value of noncharitable-use assets for 2015 from Part X, line 5.	4	32,253,460
5	Multiply line 4 by line 3.	5	4,787,188
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	18,645
7	Add lines 5 and 6.	7	4,805,833
8	Enter qualifying distributions from Part XII, line 4.	8	5,650,939

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

Part VI

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

1a

Exempt operating foundations described in section 4940(d)(2), check here ☐

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

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-)

3

Add lines 1 and 2.

4

Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)

5

Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-

6

Credits/Payments

a

2015 estimated tax payments and 2014 overpayment credited to 2015

6a

21,000

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.

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**.

11

Enter the amount of line 10 to be **Credited to 2015 estimated tax** 2,355 **Refunded**

1

18,645

0

18,645

0

18,645

21,000

2,355

0

Part VII-A

Statements 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

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 \$ 0

2

Has the foundation engaged in any activities that have not previously been reported to the IRS?

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

Yes

b

If "Yes," has it filed a tax return on **Form 990-T** for this year?

4b

Yes

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

•

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? 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)

NY

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 2015 or the taxable year beginning in 2015 (see instructions for Part XIV)?

9

No

If "Yes," complete Part XIV

10

Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses.

10

No

Part VII-A

Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶N/A	13	Yes	
14	The books are in care of ▶THE SHORELAND FOUNDATION Telephone no ▶(631) 351-0961 Located at ▶38 CAMEL HOLLOW ROAD LLOYD HARBOR NY ZIP+4 ▶11743			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here ▶ <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year ▶	15		
16	At any time during calendar year 2015, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes", enter the name of the foreign country ▶	16	Yes	No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
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)? <input type="checkbox"/> Organizations relying on a current notice regarding disaster assistance check here. ▶ <input type="checkbox"/>	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 2015? <input type="checkbox"/>	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 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions). <input type="checkbox"/>	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If "Yes," did it have excess business holdings in 2015 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period?(<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015.</i>) <input type="checkbox"/>	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 2015?	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))?

☐ 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?

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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)?

☐ Yes ☒ No

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?

☐ Yes ☒ No

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?

☐ Yes ☒ No

b

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

☐ Yes ☒ 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?

☐ Yes ☒ No

b

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

☐ Yes ☒ No

5b

6b

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	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
ANTHONY W WANG 38 CAMEL HOLLOW ROAD LLOYD HARBOR, NY 11743	VICE PRESIDENT 1 00	0	0	0
LULU C WANG 38 CAMEL HOLLOW ROAD LLOYD HARBOR, NY 11743	PRESIDENT 2 00	0	0	0
CAROL-ANN MEALEY 38 CAMEL HOLLOW ROAD LLOYD HARBOR, NY 11743	SECRETARY 5 00	0	0	0

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	Title, and average hours per week (b) devoted to position	(c) Compensation	Contributions to employee benefit plans and deferred compensation (d)	Expense account, (e) other allowances
NONE				

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

0

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

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	27,067,960
b	Average of monthly cash balances.	1b	176,669
c	Fair market value of all other assets (see instructions).	1c	5,500,000
d	Total (add lines 1a, b, and c).	1d	32,744,629
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	32,744,629
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	491,169
5	Net value of noncharitable-use assets.Subtract line 4 from line 3 Enter here and on Part V, line 4	5	32,253,460
6	Minimum investment return.Enter 5% of line 5.	6	1,612,673

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	1,612,673
2a	Tax on investment income for 2015 from Part VI, line 5.	2a	18,645
b	Income tax for 2015 (This does not include the tax from Part VI).	2b	2,887
c	Add lines 2a and 2b.	2c	21,532
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	1,591,141
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	1,591,141
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amountas adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	1,591,141

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	5,650,939
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	5,650,939
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	18,645
6	Adjusted qualifying distributions.Subtract line 5 from line 4.	6	5,632,294

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 2014	(c) 2014	(d) 2015
1 Distributable amount for 2015 from Part XI, line 7				1,591,141
2 Undistributed income, if any, as of the end of 2015				
a Enter amount for 2014 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2015				
a From 2010.	1,787,155			
b From 2011.	1,419,457			
c From 2012.	4,208,771			
d From 2013.	4,056,417			
e From 2014.	431,461			
f Total of lines 3a through e.	11,903,261			
4 Qualifying distributions for 2015 from Part XII, line 4 ▶ \$ 5,650,939				
a Applied to 2014, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2015 distributable amount.				1,591,141
e Remaining amount distributed out of corpus	4,059,798			
5 Excess distributions carryover applied to 2015 (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	15,963,059			
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 2014 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2010 not applied on line 5 or line 7 (see instructions). . .	1,787,155			
9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a	14,175,904			
10 Analysis of line 9				
a Excess from 2011.	1,419,457			
b Excess from 2012.	4,208,771			
c Excess from 2013.	4,056,417			
d Excess from 2014.	431,461			
e Excess from 2015.	4,059,798			

Part XIV

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2015, enter the date of the ruling. . . .

b Check box to indicate whether the organization is a private operating foundation described in section 170(c)(2)(B)(i) or 170(c)(2)(B)(ii): ☐ 170(c)(2)(B)(i) or ☐ 170(c)(2)(B)(ii)

	Tax year	Prior 3 years			(e) Total
	(a) 2015	(b) 2014	(c) 2013	(d) 2012	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test—enter					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.					
c "Support" alternative test—enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties).					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 Information Regarding Foundation Managers:

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

See Additional Data Table

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

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

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

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

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

c Any submission deadlines

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

Part XV

Supplementary Information(continued)

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

Recipient	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 See Additional Data Table				
Total			3a	5,613,053
b Approved for future payment				
Total			3b	0

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2015)

Form 990PF Part XV Line 1a - List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000).

ANTHONY W WANG
LULU C WANG

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>				
122 EAST 66TH STREET FOUNDATION 122 EAST 66TH STREET NEW YORK,NY 10065	NONE	EXEMPT	GENERAL PROGRAM	20,000
AMERICAN FRIENDS OF THE FUNDACIOIN CARDIOIN 9918 MEADOWLARK RD VIENNA,VA 22182	NONE	EXEMPT	GENERAL PROGRAM	5,000
ASIA SOCIETY TEXAS CENTER 1370 SOUTHMORE BLVD HOUSTON,TX 77004	NONE	EXEMPT	GENERAL PROGRAM	1,500
ASIA SOCIETY 725 PARK AVENUE NEW YORK,NY 10021	NONE	EXEMPT	GENERAL PROGRAM	422,307
ASIA SOCIETY 725 PARK AVENUE NEW YORK,NY 10021	NONE	EXEMPT	GENERAL PROGRAM, CONTRIBUTED 16,750 SHS OF LLPFX, BOOK VALUE OF \$494,975 = PURCHASE PRICE,CONTRIBUTION AMOUNT = FMV LISTED ON DATE OF CONTRIBUTION = \$500,000,DATE OF CONTRIBUTION WAS 7/7/2015	500,000
ASSOC FOR FRONTOTEMPORAL DEGENERATION RADNOR STATION BLDG 2 STE 3 RADNOR,PA 19087	NONE	EXEMPT	GENERAL PROGRAM	10,000
CHINA INSTITUTE 125 EAST 65TH STREET NEW YORK,NY 10065	NONE	EXEMPT	GENERAL PROGRAM	15,000
CITY MEALS ON WHEELS 355 LEXINGTON AVE NEW YORK,NY 10014	NONE	EXEMPT	GENERAL PROGRAM	1,000
COLUMBIA BUSINESS SCHOOL 33 WEST 60TH STREET 7TH FLOOR NEW YORK,NY 10023	NONE	EXEMPT	GENERAL PROGRAM	648,500
COMMITTEE OF 100 677 FIFTH AVENUE 5TH FLOOR NEW YORK,NY 10022	NONE	EXEMPT	GENERAL PROGRAM	12,200
COUNCIL FOR ECONOMIC EDUCATION 122 EAST 42ND ST NEW YORK,NY 10168	NONE	EXEMPT	GENERAL PROGRAM	9,700
ESSEX FOX HOUNDS PO BOX 295 GLADSTONE,NJ 07934	NONE	EXEMPT	GENERAL PROGRAM	1,000
FACING HISTORY 16 HURDED RD BROOKLINE,MA 02445	NONE	EXEMPT	GENERAL PROGRAM	1,000
GIRL SCOUTS OF GREATER NY 43 WEST 23RD STREET NEW YORK,NY 10010	NONE	EXEMPT	GENERAL PROGRAM	1,500
HAVERFORD COLLEGE 370 LANCASTER AVE HAVERFORD,PA 19041	NONE	EXEMPT	GENERAL PROGRAM	1,000
Total			3a	5,613,053

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>				
INTERNATIONAL WOMEN'S HEALTH COALITION 333 7TH AVE 6TH FL NEW YORK,NY 10001	NONE	EXEMPT	GENERAL PROGRAM	2,500
MADISON SQUARE BOYS AND GIRLS 317 MADISON AVE STE 1110 NEW YORK,NY 10017	NONE	EXEMPT	GENERAL PROGRAM	300
NEW YORK PUBLIC LIBRARY FIFTH AVE 42ND ST NEW YORK,NY 10018	NONE	EXEMPT	GENERAL PROGRAM	1,380
NEW YORK PUBLIC RADIO 16 VARICK STREET NEW YORK,NY 10013	NONE	EXEMPT	GENERAL PROGRAM	50,295
NY PHILHARMONIC 10 LINCOLN CENTER PLAZA NEW YORK,NY 10012	NONE	EXEMPT	GENERAL PROGRAM	3,000
PREP FOR PREP 156 FIFTH AVENUE SUITE 1100 NEW YORK,NY 10010	NONE	EXEMPT	GENERAL PROGRAM	5,000
ROCKEFELLER UNIVERSITY 1230 YORK AVENUE NEW YORK,NY 10021	NONE	EXEMPT	GENERAL PROGRAM	165,000
ROCKEFELLER UNIVERSITY 1230 YORK AVENUE NEW YORK,NY 10021	NONE	EXEMPT	GENERAL PROGRAM,CONTRIBUTED 22,860 SHS OF LLPFX,BOOK VALUE OF \$675,539 = PURCHASE PRICE,CONTRIBUTION AMOUNT = FMV LISTED ON DATE OF CONTRIBUTION = \$700,000,DATE OF CONTRIBUTION WAS 6/25/2015	700,000
SCHWARZMAN SCHOLARS PROGRAM 220 SAND HILL RD STE 160 MENLO PARK,CA 94025	NONE	EXEMPT	GENERAL PROGRAM	20,000
SKOWHEGAN 136 WEST 22ND STREET NEW YORK,NY 10011	NONE	EXEMPT	GENERAL PROGRAM	5,000
STRIVE 240 EAST 123RD STREET 3RD FL NEW YORK,NY 10035	NONE	EXEMPT	GENERAL PROGRAM	4,320
THE EDUCATION FUND OF THE WOMEN'S FORUM 55 WEST 39TH STREET STE 12N NEW YORK,NY 10018	NONE	EXEMPT	GENERAL PROGRAM	8,500
THE FRICK COLLECTION 1 EAST 70TH ST NEW YORK,NY 10021	NONE	EXEMPT	GENERAL PROGRAM	5,000
THE METROPOLITAN MUSEUM OF ART 1000 FIFTH AVE NEW YORK,NY 10001	NONE	EXEMPT	GENERAL PROGRAM	485,251
THE METROPOLITAN MUSEUM OF ART 1000 FIFTH AVE NEW YORK,NY 10001	NONE	EXEMPT	GENERAL PROGRAM,CONTRIBUTED 78,198 SHS OF LLPFX,BOOK VALUE OF \$2,454,182 = PURCHASE PRICE,CONTRIBUTION AMOUNT = FMV LISTED ON DATE OF CONTRIBUTION = \$2,500,000,DATE OF CONTRIBUTION WAS 4/15/2015	2,500,000
Total			3a	5,613,053

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>				
THE SOCIETY OF MEMORIAL SLOAN KETTERING 1275 YORK AVE NEW YORK, NY 10065	NONE	EXEMPT	GENERAL PROGRAM	500
TRICKLE UP 104 W 27TH STREET FL 12 NEW YORK, NY 10001	NONE	EXEMPT	GENERAL PROGRAM	6,000
URBAN PATHWAYS 575 8TH AVE 16TH FL NEW YORK, NY 10018	NONE	EXEMPT	GENERAL PROGRAM	300
VERA INSTITUTE OF JUSTICE 411 EAST 83RD ST STE 3F NEW YORK, NY 10028	NONE	EXEMPT	GENERAL PROGRAM	1,000
Total				5,613,053

TY 2015 Accounting Fees Schedule

Name: THE SHORELAND FOUNDATION

EIN: 11-3241828

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PROFESSIONAL FEES	27,696	5,539	0	22,157

TY 2015 Investments Corporate Stock Schedule

Name: THE SHORELAND FOUNDATION
EIN: 11-3241828

Name of Stock	End of Year Book Value	End of Year Fair Market Value
700 SHS AMAZON	307,431	473,196
3150 SHS APPLE INC	242,677	331,569
2000 SHS AUTODESK	71,988	121,860
730 SHS BLACKROCK INC	129,438	248,580
3000 SHS BLACKSTONE GROUP	79,240	87,720
4500 SHS BRISTOL MYERS SQUIBB	233,072	309,555
4840 SHS COGNIZANT TECH SOLUTIONS CL-A	180,456	290,497
8190 SHS EAST WEST BANCORP	186,291	340,377
8400 SHS GENERAL ELECTRIC	151,225	261,660
4000 SHS HOME DEPOT INC	266,434	529,000
3700 SHS HONEYWELL INT'L INC	216,070	383,209
8000 SHS NIKE INC	214,428	500,000
4500 SHS PENSKE AUTOMOTIVE GRP	198,735	190,530
1500 SHS PRAXAIR INC COM	166,736	153,600
3500 SHS ROBERT HALF INT'L INC	96,022	164,990
1660 SHS ROCKWELL AUTOMATION INC	108,264	170,333
5480 SHS SALESFORCE COM INC CMN	191,796	429,632
6100 SHS SPLUNK INC	331,246	358,741
8000 SHS STARBUCKS CORP	174,442	480,240
1000 SHS TESLA MOTORS INC	228,298	240,010
2917 SHS THERMO FISHER SCIENTIFIC	190,274	413,777
2035 SHS UNITED TECHNOLOGIES CORP COM	157,598	195,502
5532 SHS VISA INC. CMN CLASS A	197,597	429,007
4900 FACEBOOK	444,791	512,834
400 FEDEX CORP	66,370	59,596
2300 SHS ILLUMINA INC	433,307	441,473
5500 SHS MORGAN STANLEY	178,610	174,955
200 SHS THE PRICELINE GROUP INC	181,541	254,990
3100 SHS ULTA SALON COSMETICS & FRAGRANCE INC	363,079	573,500
1500 SHS WORKDAY INC-CLASS A	131,933	119,520

Name of Stock	End of Year Book Value	End of Year Fair Market Value
6000 SHS HONG KONG EXCHANGES	134,437	153,674
7900 SHS LULULEMON ATHLETICA INC	389,839	414,513
2000 SHS ALIBABA GROUP HOLDING LTD	166,220	162,540
26700 SHS TENCENT HOLDINGS LTD HKD	304,917	525,377
350 SHS ALPHABET INC CL C	139,647	265,608
320 SHS ALPHABET INC CL A	126,755	248,963
2500 SHS EVERCORE PARTNERS INC	136,841	135,175
1000 SHS HALLIBURTON	43,379	34,040
2500 SHS NETFLIX INC	254,657	285,950
1000 SHS RALPH LAUREN CORP	112,250	111,480
2000 SHS UNDER ARMOUR INC	191,187	161,220
14000 SHS INDITEX-UNSPON	218,267	241,500
13900 SHS PANASONIC CORP	187,953	143,012
1700 TOYOTA MOTOR CORP	218,657	209,168
12000 JD.COM INC	317,170	387,180
7000 SHS FANUC CORP	192,420	201,635

TY 2015 Investments - Other Schedule

Name: THE SHORELAND FOUNDATION

EIN: 11-3241828

Category / Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
HARBOR FUND	AT COST	4,260,015	7,003,412
PRUDENTIAL	AT COST	4,861,619	5,056,893

TY 2015 Other Assets Schedule

Name: THE SHORELAND FOUNDATION

EIN: 11-3241828

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
DONATED AUTOS	1,283,102	1,283,102	5,550,000

TY 2015 Other Expenses Schedule**Name:** THE SHORELAND FOUNDATION**EIN:** 11-3241828

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FILING FEES	750	0	0	750
INVESTMENT EXPENSE	1,720	1,720	0	0
MISCELLANEOUS EXPENSE	14,979	0	0	14,979

TY 2015 Other Income Schedule

Name: THE SHORELAND FOUNDATION

EIN: 11-3241828

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
THE BLACKSTONE GROUP K-1	1,095	1,095	

TY 2015 Other Increases Schedule**Name:** THE SHORELAND FOUNDATION**EIN:** 11-3241828

Description	Amount
REFUND OF PRIOR YEARS TAX	7,250
EXCESS OF FMV OVER BOOK VALUE ON STOCK CONTRIBUTIONS	75,304
K-1 NON-DEDUCTIBLE DISTRIBUTION, NET	1,754

TY 2015 Other Liabilities Schedule

Name: THE SHORELAND FOUNDATION

EIN: 11-3241828

Description	Beginning of Year - Book Value	End of Year - Book Value
LINE OF CREDIT	3,500,000	3,500,000

TY 2015 Taxes Schedule**Name:** THE SHORELAND FOUNDATION**EIN:** 11-3241828

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAX	2,591	2,591	0	0
EXCISE TAX	34,145	0	0	0
NYS UNRELATED BUSINESS INCOME TAX	4,000	4,000	0	0