m **990-PF**

artment of the Treasury
nal Revenue Service

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

OMB No 1545-0052

2015

Open to Public Inspection

calendar year 2015 or tax year beginning , and ending

ame of foundation: SHIRLEY BROWNRIGG CHARITABLE TRUST

A Employer identification number: 13-7059466

umber and street (or P O box number if mail is not delivered to street address): ?.O. BOX 147 | Room/suite:

B Telephone number (see instructions): 413-458-9260

ity or town, state or province, country, and ZIP or foreign postal code: VILLIAMSTOWN MA 01267

C If exemption application is pending, check here ▶ ☐

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 ▶ ☐

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 ▶ ☐

Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ $ 2,513,509

J Accounting method. ☒ Cash ☐ Accrual ☐ Other (specify) (Part I, column (d) must be on cash basis.)

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐

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)
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	115,562	115,562		
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	45,891			
b	Gross sales price for all assets on line 6a 72,104				
7	Capital gain net income (from Part IV, line 2)		45,891		
8	Net short-term capital gain			0	
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)				
12	**Total.** Add lines 1 through 11	161,453	161,453	0	
13	Compensation of officers, directors, trustees, etc	31,104	31,104		31,104
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees (attach schedule) SEE STMT 1	20	20		20
b	Accounting fees (attach schedule) STMT 2	4,750	4,750		4,750
c	Other professional fees (attach schedule)				
17	Interest				
18	Taxes (attach schedule) (see instructions) STMT 3	156	156		156
19	Depreciation (attach schedule) and depletion				
20	Occupancy				
21	Travel, conferences, and meetings				
22	Printing and publications				
23	Other expenses (att sch) STMT 4	25	25		25
24	**Total operating and administrative expenses.** Add lines 13 through 23	36,055	36,055	0	36,055
25	Contributions, gifts, grants paid	115,000			115,000
26	**Total expenses and disbursements.** Add lines 24 and 25	151,055	36,055	0	151,055
27	Subtract line 26 from line 12:				
a	**Excess of revenue over expenses and disbursements**	10,398			
b	**Net investment income** (if negative, enter -0-)		125,398		
c	**Adjusted net income** (if negative, enter -0-)			0	

FEB 2 2 2016

or Paperwork Reduction Act Notice, see instructions.

A

Form **990-PF** (2015)

2

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 (a) Book Value	End of year (b) Book Value	End of year (c) Fair Market Value
1	Cash – non-interest-bearing	75,918	24,999	24,999
2	Savings and temporary cash investments	35,955	67,982	67,982
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 (att schedule) ▶			
	Less: allowance for doubtful accounts ▶ 0			
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) SEE STMT 5	1,586,570	1,615,860	1,891,264
c	Investments – corporate bonds (attach schedule) SEE STMT 6	467,529	467,529	529,264
11	Investments – land, buildings, and equipment basis ▶			
	Less accumulated depreciation (attach sch) ▶			
12	Investments – mortgage loans			
13	Investments – other (attach schedule)			
14	Land, buildings, and equipment: basis ▶			
	Less: accumulated depreciation (attach sch) ▶			
15	Other assets (describe ▶)			
16	**Total assets** (to be completed by all filers – see the instructions. Also, see page 1, item I)	2,165,972	2,176,370	2,513,509
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	
	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	2,165,972	2,165,972	
28	Paid-in or capital surplus, or land, bldg , and equipment fund			
29	Retained earnings, accumulated income, endowment, or other funds		10,398	
30	**Total net assets or fund balances** (see instructions)	2,165,972	2,176,370	
31	**Total liabilities and net assets/fund balances** (see instructions)	2,165,972	2,176,370	

Part III Analysis of Changes in Net Assets or Fund Balances

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	2,165,972
Enter amount from Part I, line 27a	2	10,398
Other increases not included in line 2 (itemize) ▶	3	
Add lines 1, 2, and 3	4	2,176,370
Decreases not included in line 2 (itemize) ▶	5	
Total net assets or fund balances at end of year (line 4 minus line 5) – Part II, column (b), line 30	6	2,176,370

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)
1a	EXELIS INC.	P	02/14/13	02/06/15
b	AMERIPRISE FINANCIAL INC.	P	04/08/96	03/23/15
c	PROCTER & GAMBLE	P	08/04/98	04/09/15
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	23,452		9,865	13,587
b	24,243		4,676	19,567
c	24,409		11,672	12,737
d				
e				

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

	(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	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a				13,587
b				19,567
c				12,737
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	45,891
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 the 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	131,977	2,732,426	0.048300
2013	125,003	2,618,747	0.047734
2012	120,131	2,456,551	0.048902
2011	116,997	2,376,371	0.049233
2010	115,318	2,220,665	0.051929

2	Total of line 1, column (d)	2	0.246098
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	0.049220
4	Enter the net value of noncharitable-use assets for 2015 from Part X, line 5	4	2,609,352
5	Multiply line 4 by line 3	5	128,432
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	1,254
7	Add lines 5 and 6	7	129,686
8	Enter qualifying distributions from Part XII, line 4	8	151,055

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 instructions)

a	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	1,254
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)				
	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			2	0
	Add lines 1 and 2			3	1,254
	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			4	0
	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-			5	1,254
	Credits/Payments:				
a	2015 estimated tax payments and 2014 overpayment credited to 2015	6a	2,161		
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			
	Total credits and payments. Add lines 6a through 6d			7	2,161
	Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached			8	
	Tax due. If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶			9	
	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶			10	907
	Enter the amount of line 10 to be. **Credited to 2016 estimated tax** ▶ 907 Refunded ▶			11	

Part VII-A Statements Regarding Activities

			Yes	No
a	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		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)?	1b		X
	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		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: **(1)** On the foundation. ▶ $ ______ **(2)** On foundation managers ▶ $ ______			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ ______			
	Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities	2		X
	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		X
a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year? N/A	4b		
	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.	5		X
	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? N/A	6		
	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	X	
a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ NJ			
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	X	
	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)? If "Yes," complete Part XIV	9		X
	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X

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Part VII-A Statements Regarding Activities (continued)

			Yes	No
	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		X
	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		X
	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ▶ N/A

The books are in care of ▶ ELIZABETH L. HUGHES Telephone no ▶ 413-458-9260
PO BOX 147

Located at ▶ WILLIAMSTOWN MA ZIP+4 ▶ 01267

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

			Yes	No
	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?	16		X
	See the instructions for exceptions and filing requirements for FinCEN Form 114. 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
a	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)?	N/A	1b		
	Organizations relying on a current notice regarding disaster assistance check here	▶ ☐			
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?	N/A	1c		
	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?	☐ 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)	N/A	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				
a	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 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? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015)	N/A	3b		
a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a		X
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		X

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

a 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)? N/A | 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? N/A ☐ Yes ☐ No

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

a 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? | 6b | | X

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

a 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? N/A | 7b | |

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

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

(a) Name and address		(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SAMUEL H. LAITMAN PO BOX 147	WILLIAMSTOWN MA 01267	TRUSTEE 1.00	1,513	0	0
ANDREW R. LAITMAN 2-B CLOVER PATH	MAPLE SHADE NJ 08052	TRUSTEE 1.00	9,863	0	0
CATHERINE L. BURKE 23 BELLE AVENUE	SAN RAFAEL CA 94901	TRUSTEE 1.00	9,864	0	0
ELIZABETH L. HUGHES 10520 CALUMET DRIVE	SILVER SPRING MD 20910	TRUSTEE 1.00	9,864	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	(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

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

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
ONE		
al number of others receiving over $50,000 for professional services ▶		

art IX-A Summary of Direct Charitable Activities

st the foundation's four largest direct charitable activities during the tax year Include relevant statistical information such as the number of ganizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
N/A	

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

escribe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
N/A	
l other program-related investments See instructions	
al. Add lines 1 through 3 ▶	

art 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, purposes:			
Average monthly fair market value of securities		1a	2,546,661
Average of monthly cash balances		1b	102,427
Fair market value of all other assets (see instructions)		1c	0
Total (add lines 1a, b, and c)		1d	2,649,088
Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e 0		
Acquisition indebtedness applicable to line 1 assets		2	0
Subtract line 2 from line 1d		3	2,649,088
Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions)		4	39,736
Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4		5	2,609,352
Minimum investment return. Enter 5% of line 5		6	130,468

art 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.)

Minimum investment return from Part X, line 6		1	130,468
Tax on investment income for 2015 from Part VI, line 5	2a 1,254		
Income tax for 2015. (This does not include the tax from Part VI.)	2b		
Add lines 2a and 2b		2c	1,254
Distributable amount before adjustments Subtract line 2c from line 1		3	129,214
Recoveries of amounts treated as qualifying distributions		4	
Add lines 3 and 4		5	129,214
Deduction from distributable amount (see instructions)		6	
Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1		7	129,214

'art XII **Qualifying Distributions** (see instructions)

Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
Expenses, contributions, gifts, etc – total from Part I, column (d), line 26	1a	151,055
Program-related investments – total from Part IX-B	1b	
Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc, purposes	2	
Amounts set aside for specific charitable projects that satisfy the		
Suitability test (prior IRS approval required)	3a	
Cash distribution test (attach the required schedule)	3b	
Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	151,055
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	1,254
Adjusted qualifying distributions. Subtract line 5 from line 4	6	149,801

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

rt XIII Undistributed Income (see instructions)

		(a) Corpus	(b) Years prior to 2014	(c) 2014	(d) 2015
Distributable amount for 2015 from Part XI, line 7					129,214
Undistributed income, if any, as of the end of 2015. Enter amount for 2014 only					
Total for prior years. 20 ____ , 20 ____ , 20 ____					
Excess distributions carryover, if any, to 2015:					
From 2010	6,032				
From 2011	1,735				
From 2012					
From 2013					
From 2014					
Total of lines 3a through e		7,767			
Qualifying distributions for 2015 from Part XII, line 4 ▶ $ 151,055					
Applied to 2014, but not more than line 2a					
Applied to undistributed income of prior years (Election required – see instructions)					
Treated as distributions out of corpus (Election required – see instructions)					
Applied to 2015 distributable amount					129,214
Remaining amount distributed out of corpus		21,841			
Excess distributions carryover applied to 2015 (If an amount appears in column (d), the same amount must be shown in column (a))					
Enter the net total of each column as indicated below:					
Corpus. Add lines 3f, 4c, and 4e Subtract line 5		29,608			
Prior years' undistributed income. Subtract line 4b from line 2b					
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					
Subtract line 6c from line 6b. Taxable amount – see instructions					
Undistributed income for 2014 Subtract line 4a from line 2a. Taxable amount – see instructions					
Undistributed income for 2015. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2016					0
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)					
Excess distributions carryover from 2010 not applied on line 5 or line 7 (see instructions)		6,032			
Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a		23,576			
Analysis of line 9.					
Excess from 2011	1,735				
Excess from 2012					
Excess from 2013					
Excess from 2014					
Excess from 2015	21,841				

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

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 ▶

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

	Tax year	Prior 3 years			(e) Total
	(a) 2015	(b) 2014	(c) 2013	(d) 2012	
Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
85% of line 2a					
Qualifying distributions from Part XII, line 4 for each year listed					
Amounts included in line 2c not used directly for active conduct of exempt activities					
Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
Complete 3a, b, or c for the alternative test relied upon. "Assets" alternative test – enter. (1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
"Endowment" alternative test – enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
"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					

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

Information Regarding Foundation Managers:

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))

N/A

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

N/A

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

The name, address, and telephone number or e-mail address of the person to whom applications should be addressed:

N/A

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

N/A

Any submission deadlines:

N/A

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

N/A

Part XV Supplementary Information (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year SEE ATTACHED				115,000
Total			▶ 3a	115,000
b Approved for future payment N/A				
Total			▶ 3b	

: XVI-A Analysis of Income-Producing Activities

ross amounts unless otherwise indicated.	Unrelated business income (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income (See instructions)
›gram service revenue.					
Fees and contracts from government agencies					
embership dues and assessments					
terest on savings and temporary cash investments					
vidends and interest from securities			14	115,562	
et rental income or (loss) from real estate:					
Debt-financed property					
Not debt-financed property					
et rental income or (loss) from personal property					
ther investment income					
ain or (loss) from sales of assets other than inventory			14	45,891	
et income or (loss) from special events					
ross profit or (loss) from sales of inventory					
ther revenue: a					
ubtotal Add columns (b), (d), and (e)		0		161,453	0

otal. Add line 12, columns (b), (d), and (e) 13 161,453

worksheet in line 13 instructions to verify calculations)

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

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

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

			Yes	No
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?				
Transfers from the reporting foundation to a noncharitable exempt organization of				
(1) Cash		1a(1)		X
(2) Other assets		1a(2)		X
Other transactions				
(1) Sales of assets to a noncharitable exempt organization		1b(1)		X
(2) Purchases of assets from a noncharitable exempt organization		1b(2)		X
(3) Rental of facilities, equipment, or other assets		1b(3)		X
(4) Reimbursement arrangements		1b(4)		X
(5) Loans or loan guarantees		1b(5)		X
(6) Performance of services or membership or fundraising solicitations		1b(6)		X
Sharing of facilities, equipment, mailing lists, other assets, or paid employees		1c		X

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.

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements
A			

a 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
N/A		

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

May the IRS discuss this return with the preparer shown below (see instructions)? ☒ Yes ☐ No

Sign Here: [signature] 2/15/16 TRUSTEE

Signature of officer or trustee | Date | Title

Paid Preparer Use Only				
Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	
JULIE P. ARNOLD, CPA	[signature]	02/06/16		
Firm's name ▶ GAJDA, ARNOLD & MCCONNELL, PC		PTIN	P00420848	
Firm's address ▶ 1 BANK ST WILLIAMSTOWN, MA 01267-2856		Firm's EIN ▶	27-4359547	
		Phone no	413-458-5722	

Statement 1 - Form 990-PF, Part I, Line 16a - Legal Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
LEGAL FEES	$ 20	$ 20	$	$ 20
TOTAL	$ 20	$ 20	$ 0	$ 20

Statement 2 - Form 990-PF, Part I, Line 16b - Accounting Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
ACCOUNTING FEES	$ 4,750	$ 4,750	$	$ 4,750
TOTAL	$ 4,750	$ 4,750	$ 0	$ 4,750

Statement 3 - Form 990-PF, Part I, Line 18 - Taxes

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
FOREIGN TAXES PAID	$ 126	$ 126	$	$ 126
NJ FILING FEE	30	30		30
TOTAL	$ 156	$ 156	$ 0	$ 156

Statement 4 - Form 990-PF, Part I, Line 23 - Other Expenses

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
	$	$	$	$
EXPENSES				
BANK FEES	25	25		25
TOTAL	$ 25	$ 25	$ 0	$ 25

Statement 5 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
STIFEL ACCOUNT	$ 1,586,570	$ 1,615,860	COST	$ 1,891,264
TOTAL	$ 1,586,570	$ 1,615,860		$ 1,891,264

Statement 6 - Form 990-PF, Part II, Line 10c - Corporate Bond Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
STIFEL ACCOUNT	$ 467,529	$ 467,529	COST	$ 529,264
TOTAL	$ 467,529	$ 467,529		$ 529,264

IRLEY BROWNRIGG CHARITABLE TRUST - EIN 13-7059466
·t XV - Supplemental Information Page 11
- Grants and Contributions Paid During the Year

			Amount	Purpose
ıcostia Watershed Society	4302 Baltimore Avenue	Baldensburg, MD 20710	$ 2,000.00	(a)
ls/Life Cycle	PO Box 39000	San Francisco, CA 94139	2,000.00	(a)
·kshire Food Project	PO Box 651 134 Main St	North Adams, MA 01247	10,000.00	(a)
ıldren's Future	1031 33rd Street - Ste 172	Denver, CO 80205	5,000.00	(a)
·ate Arts Center	816 Thayer Avenue #1	Silver Spring, MD 20910	1,000.00	(a)
ıwbridge	PO Box 2698	San Rafael, CA 94912	1,000.00	(a)
ɔd and Friends	219 Riggs Rd.	NE Washington, DC 20011	7,000.00	(a)
ınces Young Tang Museum	815 North Broadway	Saratoga Springs, NY 12866	2,000.00	(a)
ends of Brookside Gardens	1800 Glenallan Avenue	Wheaton, MD 20902	4,000.00	(a)
ends of Library- Montg. Cty	11701 Georgia Avenue	Wheaton, MD 20902	1,000.00	(a)
spice by the Bay	17 East Sir Francis Drake Blvd	Larkspur, CA 94939	5,000.00	(a)
erary Council Of Montgomery Co.	21 Maryland Ave Ste 320	Rockville, MD 20850	5,000.00	(a)
riam's Kitchen	2401 Virginia Ave.	NW Washington, DC 20037	2,000.00	(a)
⅄MI Foundation	555 Northgate Dr Ste 280	San Rafael, CA 94903	5,000.00	(a)
⅄MI Foundation	555 Northgate Dr Ste 280	San Rafael, CA 94903	5,000.00	(a)
ɔspect Park Alliance	95 Prospect Park West	Brooklyn, NY 11215	1,000.00	(a)
ramid Atlantic	8230 Georgia Ave.	Silver Spring, MD 20910	3,000.00	(a)
ıutes to Africa	111 Coolidge Hill	Cambridge, MA 02138	8,000.00	(a)
eperd's Table	8210 Dixon Avenue	Silver Spring, MD 20910	10,000.00	(a)
idmore College	815 North Broadway	Saratoga Springs, NY 12866	6,000.00	(a)
ıe Moth	481 Broadway, Third Floor	New York, NY 10013	7,000.00	(a)
ıis American Life	848 E Grand Ave.	Chicago, IL 60611	2,000.00	(a)
ednesday's Gift	PO Box 2668	San Rafael, CA 94912	5,000.00	(a)
oodley House	1408 North Capitol Street NW	Washington, DC 20002	1,000.00	(a)
oodlin PTA	2101 Luzerne Ave.	Silver Spring, MD 20910	15,000.00	(a)
			$ 115,000	

) except as noted, the above grants are unrestricted and can be used by the organization for any of their qualified activities.