

See a Social Security Number? Say Something! Report Privacy Problems to https://public.resource.org/privacy Or call the IRS Identity Theft Hotline at 1-800-908-4490



SCANNED MAR 0 2 2016

Form **990-PF** Department of the Treasury Internal 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

A fimployer identification number SMS FOUNDATION, INC. Notes and served for 9 Day number at soil delivered to creet accressory PO BOX 53.24 Check all that apply: I list efficient I list and return I list an	For	caler	ndar year 2015 or tax year beginning			, and e	nding			
The continuence of the continu	Nai	ne o	foundation					A Employer ide	ntification	number
P.D. BOX 53.24 Give to rous, state or province, country, and 7IP or foreign postal code MAD 150N, W1 53705-0324 Give the rous of the r	S	MS	FOUNDATION, INC.					20-187	8599	
Total power of the province, country, and ZiP or foreign postal code MADISON, WI \$ 37.05 - 0.32.4	Nur	nber a	and street (or P.O. box number if mail is not delivered to street a	addre	ess)		Room/suite			
MADISON, WI 53705 – 0324 6 Check all that apply: Intellecture Amended return Amen								608-57	<u> 17-82</u>	60
Check all that apply.				osta	al code			C If exemption app	lication is pe	ending, check here
First leturn Amended return Amende								<u>-</u>		
Manne Change Section 901(x)(3) exempt private foundation Section 9947(3)(1) nonexempt charitable insist Other transition Cash Accrual from Part II. Cold (2), Inter 15 Assistance Accrual from Part II. Cold (2), Inter 15 Assistance Accusing method: Cash Accrual from Part II. Cold (2), Inter 15 Assistance Cash Accrual from Part II. Cold (2), Inter 15 Assistance Cash Accrual from Part II. Cold (2), Inter 15 Assistance Cash Accrual from Part II. Cold (2), Inter 15 Assistance Cash Accrual from Part II. Cold (2), Inter 15 Assistance Cash Accrual from Part II. Cold (2), Inter 15 Assistance Cash Accrual from Part III. Cold (3), Inter 15 Assistance Cash Accrual from Part III. Cold (3), Inter 15 Assistance Cash Accrual from Part III. Cold (3), Inter 15 Assistance Cash Accrual from Part III. Cold (3), Inter 15 Assistance Cash Accrual from Part III. Cold (3), Inter 15 Assistance Cash Accrual from Part III. Cold (3), Inter 15 Assistance Cash Accrual from Part III. Inter 2 Assistance Cash Accounting from Part III. Inter 2 Assistance Cash Accounting from Part III. Inter 2 Accounting from Part	G (neck				ormer public d	charity	D 1 Foreign org	anizations	s, check here
H. Check hope of organization Section 901(c)(3) exempt private foundation Section 4947(3)(1) nonexempt character trust Other trabble private foundation Tarm market value of all assets at end of year J. Accounting method: Cash Accrual (from Part II, col. (c), iner 16) Check here Other (specify) Cash Accounting method: Cash Accounting method: Cash Accounting method: Cash								2 Foreign organ	uzations me	eting the 85% test
Section 4947(a)(1) nonecempt charachibe trust	Н (heck		vemi				1		
Far market value of all assets at end of year J Accounting method:	"					ition		1 '		. —
Contributions and Dependence of the Contribution Strict (1918) Contrib	I Fa						ual	1	. ,, ,	• ,,
Part I Analysis of Revenue and Expenses (The folial of irrotation is no clustered by (a) Revenue and components (The folial of irrotation is no clustered by (a) and (c) may not expenses (The folial of irrotation is no clustered by (a) and (c) may not expenses (The folial of irrotation is no clustered by (a) and (c) may not expenses (The folial of irrotation is no clustered by (a) and (c) may not expenses (The folial of irrotation is no clustered by (a) and (c) may not expenses (The folial of irrotation is no clustered by (a) Revenue and expenses (The folial of irrotation is no clustered by (a) Revenue and expenses (The folial of irrotation is no clustered by (a) Revenue and expenses (The folial of irrotation is no clustered by (a) Revenue and expenses (The folial of irrotation is no clustered by (a) Revenue and expenses (The folial of irrotation is no clustered by (a) Revenue and expenses (The folial of irrotation is no clustered by (a) Revenue and expenses (The folial of irrotation is no clustered by (a) Revenue and expenses (The folial of irrotation is no clustered by (a) Revenue and expenses (The folial of irrotation is no clustered by (a) Revenue and expenses (The folial of irrotation is no clustered by (a) Revenue and expenses (The folial of irrotation is no clustered by (a) Revenue and expenses (The folial of irrotation is no clustered by (a) Revenue and expenses (The folial of irrotation is no clustered by (a) Revenue and expenses (The folial of irrotation is no clustered by (a) Revenue and (a) Revenue			· — .	-						
The total of amounts in colourne (b), and (d may not necessary wheat the amounts in colourne (b)). The colourne (b) and (b) an						asis)				
1 Contributions, gifts, prints, etc., received 2	Pa	ırt l	Analysis of Revenue and Expenses			(b) Net in	vestment	(c) Adjusted	d net	
The content of the co				<u> </u>	·	inco	me)	
The rest on asonyae and temporary a continuements 4. Dividends and interest from securities 5.a Gross rents 5.a Gross rents 6.a for type of continuements 6.a for type of continuemen		1	Contributions, gifts, grants, etc., received		478,814.			N/A		77 700 77 727
1		2			. >.				<u>, 6</u>	
Sa Gross rents Sa Gross rents Sama rent Sama r		T.	cash investments	-	100 100	10	0 100			
Document)		_	\vdash	120,122.	12	U, 122.			STATEMENT *2
Sa Net separ or global from sale of assets not on line 10 66 7 , 0.59 . 7 Capital pannel income (from Part IV, line 2) 9 Income modifications 10a Gross sales less returns 10a and allowances 10 Less Cont of poods spid c Gross profit or (loss) 11 Other income 12 Total Add lines 11 thought 11 13 Cemperastion of offices, directopath UT 14 Other employee salagies and adaptase 15 Pension plans, employee benefits 16a Legal fees 15 Pension plans, employee benefits 16a Legal fees 17 STMT 4				\vdash						
Data Constraint Constrain		_	` ' 	十					* 4	STATEMENT 1
8 Net short-term capital gain 9 Income modifications 10a Gross and subvisices 10 Less Cost of goods after c Gross profit or (loss) 11 Other income 12 Total Add lines 1 Introduct 13 Compensation of offices, directory income 15 Pension plans, employee benefits 16a Legal fees 15 Pension plans, employee benefits 16a Legal fees 17 Interest 18 Taxes 18 Taxes 19 Depreciation and depletion 20 Occupancy 21 Travel, conferences, and meetings 22 Printing and publications 23 Other expenses 24 Total operating and administrative 25 Pension and depletion 26 Occupancy 27 Intavel, conferences, and meetings 28 Total operating and administrative 29 Printing and publications 20 Occupancy 21 Travel, conferences, and meetings 22 Printing and publications 23 Other expenses 24 Total operating and administrative 25 Contributions, gifts, grants paid 26 Total expenses and disbursements 27 Add lines 24 and 25 28 Subtract line 26 from line 12 28 Excess of evenue over expenses and disbursements 394,369, bt investment income (if negalive, enter -0-) 29 C Adjusted net income (if negalive, enter -0-) 20 C Adjusted net income (if negalive, enter -0-) 20 N/A	ene	Ua h	Gross sales price for all 667 050		101,237.			1	3 }	
8 Net short-term capital gain 9 Income modifications 10a Gross and subvisices 10 Less Cost of goods after c Gross profit or (loss) 11 Other income 12 Total Add lines 1 Introduct 13 Compensation of offices, directory income 15 Pension plans, employee benefits 16a Legal fees 15 Pension plans, employee benefits 16a Legal fees 17 Interest 18 Taxes 18 Taxes 19 Depreciation and depletion 20 Occupancy 21 Travel, conferences, and meetings 22 Printing and publications 23 Other expenses 24 Total operating and administrative 25 Pension and depletion 26 Occupancy 27 Intavel, conferences, and meetings 28 Total operating and administrative 29 Printing and publications 20 Occupancy 21 Travel, conferences, and meetings 22 Printing and publications 23 Other expenses 24 Total operating and administrative 25 Contributions, gifts, grants paid 26 Total expenses and disbursements 27 Add lines 24 and 25 28 Subtract line 26 from line 12 28 Excess of evenue over expenses and disbursements 394,369, bt investment income (if negalive, enter -0-) 29 C Adjusted net income (if negalive, enter -0-) 20 C Adjusted net income (if negalive, enter -0-) 20 N/A	Ven	7			\$4. S	27	8,167.	<u> </u>	**	
9 Income modifications and allowances allow services and allowances allow services and allowances and services returns and allowances and services returns and allowances and services returns be as a service of goods seld and allowances and services and	a			22	s' #	,			<u> </u>	
10 10 10 10 10 10 10 10		9	, ,	75	Min. 30 + 1 + 8 + 2 M	1	*			Av & NIN
c Gross profit or (loss) 11 Other income 12 Total Add lines 1 through 1 13 Compensation of officels, directly officels and additions of officels, directly officels and additions of officels and offices and offices and offices and offices and offices and offices and		10a		-	, ,			,		1 M x 1 E
11 Other income FEB 2 9 2016 780,173. 398,289. 398,289.		b	Less Cost of goods sold DECEVED	Ы	* *			3	\$ 9%	XX: \$1.11
12 Total Add lines 1 Total Add lines 1 Total Add lines 1 Total Add lines 2 Total Add lines 2 Total Add lines 3 Total Exp.		C		D	· - · · - · · 					
13 Compensation of office's, direct UT 0. 0. 0. 14 Other employee salaries and wages 15 Pension plans, employee benefits 16a Legal fees STMT 3 738. 0. 0. 15 Pension plans, employee benefits 16a Legal fees STMT 4 2,290. 2,290. 0. 16 December 15,887. 15,887. 0. 17 Interest 18 Taxes STMT 6 7,889. 0. 0. 19 Depreciation and depletion 0. 10 Coccupancy 21 Travel, conferences, and meetings 22 Printing and publications 23 Other expenses 24 Total operating and administrative expenses Add lines 13 through 23 26,804. 18,177. 0. 25 Contributions, gifts, grants paid 359,000. 359,000. 359,000. 26 Subtract line 26 from line 12 385,804. 18,177. 359,000. 27 Subtract line 26 from line 12 394,369. 380,112. 0. 0. 0. 0. 0. 0. 0.		11	Other income S FEB 2 9 2016	3	700 173	2.0	0 000			
14 Other employee salaries and wages 15 Pension plans, employee benefits 16a Legal fees STMT 3 738 0 0 0 0 0 0 0 0 0				K		39				- "
15 Pension plans, employee benefits 16a Legal fees STMT 3 738 0. 0. b Accounting fees STMT 4 2,290 2,290 0. c Other professional fees STMT 5 15,887. 15,887. 0. 17 Interest 18 Taxes STMT 6 7,889 0. 0. 0. 19 Depreciation and depletion 0. 20 Occupancy 21 Travel, conferences, and meetings 22 Printing and publications 23 Other expenses 24 Total operating and administrative expenses Add lines 13 through 23 26,804 18,177 0. 25 Contributions, gifts, grants paid 359,000 359,000 359,000 0. 27 Subtract line 26 from line 12 a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) 380,112 . C Adjusted net income (if negative enter -0-) N/A			Other applaces along a large and the control of the) 0.1		0.			· ·
16a Legal fees				\vdash	<u>-</u>					
b Accounting fees STMT 4 2,290. 2,290. 0. Cother professional fees STMT 5 15,887. 0. Interest 18 Taxes STMT 6 7,889. 0. 0. Depreciation and depletion 20 Occupancy 21 Travel, conferences, and meetings 22 Printing and publications 23 Other expenses 24 Total operating and administrative expenses Add lines 13 through 23 26 Contributions, gifts, grants paid 25 Contributions, gifts, grants paid 359,000. 26 Total expenses and disbursements Add lines 24 and 25 385,804. 18,177. 359,000. 27 Subtract line 26 from line 12 a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) 380,112. N/A	ģ			\vdash	738.		0.			0.
Interest 18 Taxes STMT 6 19 Depreciation and depletion 20 Occupancy 21 Travel, conferences, and meetings 22 Printing and publications 23 Other expenses 24 Total operating and administrative expenses Add lines 13 through 23 25 Contributions, gifts, grants paid 26 Total expenses and disbursements Add lines 24 and 25 385,804. 18,177. 359,000. 27 Subtract line 26 from line 12 a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) c Adjusted net income (if negative enter -0-)	Sus	b.ou		Г						
Interest 18 Taxes STMT 6 19 Depreciation and depletion 20 Occupancy 21 Travel, conferences, and meetings 22 Printing and publications 23 Other expenses 24 Total operating and administrative expenses Add lines 13 through 23 25 Contributions, gifts, grants paid 26 Total expenses and disbursements Add lines 24 and 25 385,804. 18,177. 359,000. 27 Subtract line 26 from line 12 a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) c Adjusted net income (if negative enter -0-)	ă	С	_							
19 Depreciation and depletion 20 Occupancy 21 Travel, conferences, and meetings 22 Printing and publications 23 Other expenses 24 Total operating and administrative expenses Add lines 13 through 23 25 Contributions, gifts, grants paid 26 Total expenses and disbursements Add lines 24 and 25 27 Subtract line 26 from line 12 a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) c Adjusted net income (if negative, enter -0-)		17	Interest							
22 Printing and publications 23 Other expenses 24 Total operating and administrative expenses Add lines 13 through 23 25 Contributions, gifts, grants paid 26 Total expenses and disbursements Add lines 24 and 25 27 Subtract line 26 from line 12 a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) c Adjusted net income (if negative enter -0-) 28 Other expenses 29 Other expenses 20 Definition of the spenses and administrative expenses Add lines 13 through 23 26 , 804 . 18 , 177 . 0. 359 , 000 . 359 , 000 . 359 , 000 . 27 Subtract line 26 from line 12 385 , 804 . 18 , 177 . 359 , 000 .	rati	18	Taxes STMT 6	L	7,889.		0.			0.
22 Printing and publications 23 Other expenses 24 Total operating and administrative expenses Add lines 13 through 23 25 Contributions, gifts, grants paid 26 Total expenses and disbursements Add lines 24 and 25 27 Subtract line 26 from line 12 a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) c Adjusted net income (if negative enter -0-) 28 Other expenses 29 Other expenses 20 Definition of the spenses and administrative expenses Add lines 13 through 23 26 , 804 . 18 , 177 . 0. 359 , 000 . 359 , 000 . 359 , 000 . 27 Subtract line 26 from line 12 385 , 804 . 18 , 177 . 359 , 000 .	nist	19	Depreciation and depletion	<u> </u>						* * *
22 Printing and publications 23 Other expenses 24 Total operating and administrative expenses Add lines 13 through 23 25 Contributions, gifts, grants paid 26 Total expenses and disbursements Add lines 24 and 25 27 Subtract line 26 from line 12 a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) c Adjusted net income (if negative enter -0-) 28 Other expenses 29 Other expenses 20 Definition of the spenses and administrative expenses Add lines 13 through 23 26 , 804 . 18 , 177 . 0. 359 , 000 . 359 , 000 . 359 , 000 . 27 Subtract line 26 from line 12 385 , 804 . 18 , 177 . 359 , 000 .	Ē			<u> </u>						
23 Other expenses 24 Total operating and administrative	-			-						
24 Total operating and administrative expenses Add lines 13 through 23 25 Contributions, gifts, grants paid 26 Total expenses and disbursements Add lines 24 and 25 385,804. 27 Subtract line 26 from line 12 a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) c Adjusted net income (if negative enter -0-) N/A	a			-						
26 Total expenses and disbursements Add lines 24 and 25 27 Subtract line 26 from line 12 a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) c Adjusted net income (if negative enter -0-) N/A	in a	23		-				-		
26 Total expenses and disbursements Add lines 24 and 25 27 Subtract line 26 from line 12 a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) c Adjusted net income (if negative enter -0-) N/A	era	24	•	1	26.804.	1 :	8.177.			0.
26 Total expenses and disbursements Add lines 24 and 25 27 Subtract line 26 from line 12 a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) c Adjusted net income (if negative enter -0-) N/A	Ő	25	-	\vdash			-, <u>-</u> -,,•			
Add lines 24 and 25 27 Subtract line 26 from line 12 a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) c Adjusted net income (if negative enter -0-) N/A										,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,
27 Subtract line 26 from line 12 a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) c Adjusted net income (if negative enter -0-) N/A					385,804.	1	8, <u>1</u> 77.			359,000.
b Net investment income (if negative, enter -0-) c Adjusted net income (if negative enter -0-) N/A		27								
c Adjusted net income (if negative enter -0-)		a	Excess of revenue over expenses and disbursements		394,369.					
		b	Net investment income (if negative, enter -0-)			38	0,112.			
	5225		Adjusted net income (if negative enter -0-)					N/A		600 5-

INC.

Cash - non-interest-bearing 18 , 782 . 53, 966 . 53, 966 .	P	art	Balance Sheets Atlached schedules and amounts in the description	Beginning of year		or year
2 Servings and temporary cosh investments 3 Accounts recovable ▶ 1 Less allowance for futualital accounts ▶ 2 Peologic recovable ▶ 3 Peologic recovable ▶ 4 Peologic recovable ▶ 5 Genter to recovable ▶ 5 Genter to recovable ▶ 6 Recovables due from othicers, directors, trustees, and other dissipations of the state and accounts b to the state of th			Column should be for end of-year amounts only			
Second is recovable		1	Cash - non-interest-bearing			
Less allowance for doubtful accounts		2	Savings and temporary cash investments	593,214.	<u> 251,968.</u>	251,968.
Percept receivable Liess allowance for dishibiting date with accounts		3	Accounts receivable ▶			
Secretable decreases and other decreases of the control of the co			Less: allowance for doubtful accounts			
So Comits receivable		4	Pledges receivable ►			* , ;
See Receivables due from officers, directors, frustees, and other dissipatities prisons To the ense antifaction cloubful accounts			Less: allowance for doubtful accounts ▶		•	
## STATE Market (and persons and complete inter 2 through 31 or complete inter 3 through 31		5	Grants receivable		<u>-</u>	
## STATE Market (and persons and complete inter 2 through 31 or complete inter 3 through 31		6	Receivables due from officers, directors, trustees, and other			
Propose occurrence to case and other control to counts be a linear to receive the complete to make the complete to base be an experience of the complete to base be completed by all filters assessments. Once the complete base be completed by all filters assessments and complete the complete by all filters assessments. Once the complete base be completed by all filters assessments. Once the complete base be completed by all filters assessments. Once the complete base be completed by all filters assessments. Other labelinities describe by all filters assessments. Other labelinities des		_				
Second complete lines 27 through 29 Total labilities and net assets frund balances Second complete lines 27 through 29 Total labilities and net assets frund balances Second complete lines 27 through 21 Total labilities and net assets frund balances Second complete lines 27 through 21 Total labilities and net assets frund balances Second complete lines 27 through 21 Total labilities and net assets for labilities Second complete lines 27 through 21 Second complete lines 27 through 21 Second complete lines 27 through 22 Second complete lines 27 through 25 Second comple		7		" "	, ,	\$ 2 C \$ C\$. ***
By Pripade expenses and deterred charges 10a Investments - Curporate stock 11 wiscamers - Lost, and state government obligations 12 Investments - Curporate stock 13 Investments - Curporate stock 14 wiscamers - Lost, button, as required to pass 15 Investments - Curporate stock 16 Total assets (observice 17 Investments - Investments - Investments - Curporate stock 18 Caracter State (describe 19 Investments - Investments		•				
Pregand expenses and deterred charges 10a Investments - Corporate bonds 1 investments - Corporate stock	m	8				
b timestments - corporate block c investments - corporate bonds to	sets					
Dimestments - corporate stock STMT 8 6,109,754. 6,180,891. 6,180,891.	As		· · ·			-
Investments - corporate bonds 11 Investments - mortgage loans 12 Investments - mortgage loans 13 Investments - other 14 Land, buildings, and equipment basis 16 Land, buildings, and equipment basis 16 Total assets (describe 17 Total assets (descr			~ a [6.109.754.	6.180.891.	6.180.891.
11					-,,	0,200,0320
Lies accumulated depending				" "		
Investments - mortgage loans 13 Investments - other 14 Land, buildings, and equipment basis		' '			9 (* 2.1 * 4	13.4t
13 Investments - other 14 Land, buildings, and equipment basis ► 15 Other assets (discorble ► 16 Total assets (to be completed by all filters - see the instructions. Also, see page 1, term 1) 17 Accounts payable and accrued expenses 18 Grants payable and accrued expenses 18 Grants payable and accrued expenses 19 Deferred revenue 20 Other habilities (describe ► 21 Mortgages and other notes payable 22 Other habilities (describe ► 23 Total habilities (describe ► 24 Unrestricted 25 Fernamently restricted 26 Fernamently restricted 27 Capital stock, trust principal, or current funds 28 Paid-in or capital surplus, or land, bidg., and equipment fund 29 Paid-in or capital surplus, or land, bidg., and equipment funds 20 Retained earnings, accumulated income, endowment, or other funds 27 Capital stock, trust principal, or current funds 28 Paid-in or capital surplus, or land, bidg., and equipment fund 30 Total net assets or fund balances 31 Total labilities and net assets/fund balances 31 Total labilities and net assets/fund balances 31 Total labilities and net assets/fund balances 32 Other increases not included in line 2 (temze) 33 Other increases not included in line 2 (temze) 34 Add lines 1, 2, and 3 55 Decreases not included in line 2 (temze) 56 Capy, 3944. Total line and increase are indicated in line 2 (temze) 56 Capy, 3944. Total line and increase are indicated in line 2 (temze) 57 Capital balances are indicated in line 2 (temze) 58 Estantement 7 59 Capital adances are indicated in line 2 (temze) 59 Capital and and and and a result of the annus lines 5) Part II, column (b), line 30 60 Captal and and and a result and of the annus lines 5) Part II, column (b), line 30 61 Captal and and and a result and of the annus lines 5) Part II, column (b), line 30 62 Capital and and and and a result and of the annus lines 5) Part II, column (b), line 30 63 Captal and		12				
14 Land, buildings, and equipment basis				-		
tess accumulated expressions Total residence Total residence					Ville V	Were the same same same
15 Other assets (describe		' '				., .,,
Total assets (to be completed by all filers - see the instructions. Also, see page 1, Item II) 17 Accounts payable and accrued expenses 18 Grants payable 20 Learn from officers, directors, trustees and other disqualified persons 21 Mortgages and other notes payable 22 Other liabilities (add lines 17 through 22) 23 Total liabilities (add lines 17 through 22) 24 Unrestricted 25 Temporarily restricted 26 Permanently restricted 27 Foundations that do not follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31 28 Pard-nor capatil surplus, or land, blidg, and equipment fund 29 Retained earnings, accumulated income, endowment, or other funds 29 Retained earnings, accumulated income, endowment, or other funds 30 Total net assets or fund balances 1 Total net assets or fund balances at beginning of year - Part III, column (a), line 30 (must agree with end-of-year figure reported on prior year's return) 20 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (Itemize) 20 SEE STATEMENT 7 3 Fold linet assets or fund balances at end of year (line 4 minus line 5) - Part III, column (b), line 30 5 Capata 1, 2, and 3 5 Capata 1, 2, and 3 6 Capata 3, 24, 367, 35. 6 Capata 3, 34, 367, 35. 6 Capata 3, 36, 3725.		15			 	
Instructions Also, see page 1, item I) Accounts payable and accrued expenses 18 Grants payable and accrued expenses 19 Deterred revenue 20 Learns from officers, directors, fursities and other disqualified persons 21 Mortgages and other notes payable 22 Other liabilities (add lines 17 through 22) 23 Total liabilities (add lines 17 through 22) 24 Unrestricted 25 Temporarily restricted 26 Permanently restricted 27 Capital stock, frust principal, or current funds 28 Pard-in or capital surplus, or land, blidg., and equipment fund 29 Retained earnings, accumulated income, endowment, or other funds 30 Total 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) 20 Enter amount from Part I, line 27a 30 Other increases not included in line 2 (temize) 31 Total liabilities and as sets of und balances at eleginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return) 21 Enter amount from Part I, line 27a 32 Other increases not included in line 2 (temize) 33 Other increases not included in line 2 (temize) 34 Add lines 1, 2, and 3 55 Decreases not included in line 2 (temize) 56 C 29, 394, 765. 57 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 67 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 68 C 25 TATEMENT 7 5 6 C 29, 394, 765.		l	· ————————————————————————————————————			
17 Accounts payable and accrued expenses 18 Grants payable 19 Deferred revenue 20 Loans from offices, directors, frustees and other disqualified persons 21 Mortgages and other notes payable 22 Other liabilities (describe ▶ 23 Total liabilities (add lines 17 through 22) 24 Unrestricted 25 Permorarily restricted 26 Poundations that follow SFAS 117, check here 26 and complete lines 24 through 26 and lines 30 and 31 27 Capital stock, trust principal, or current funds 28 Paramently restricted 29 Paramently restricted 29 Paramently restricted 30 Total net assets or fund balances 30 Total net assets or fund balances 40 (must agree with end-of-year figure reported on prior year's return) 50 Total net assets or fund balances at beginning of year - Part III, column (a), line 30 60 (must agree with end-of-year figure reported on prior year's return) 51 Total net assets or fund balances at Deginning of year - Part III, column (a), line 30 61 (must agree with end-of-year figure reported on prior year's return) 52 Enter amount from Part I, line 27a 53 Other increases not included in line 2 (itemize) ▶ 53 Decreases not included in line 2 (itemize) ▶ 54 Fotal net assets or fund balances at end of year (fine 4 minus line 5) - Part III, column (b), line 30 64 Gegan STATEMENT 7 65 Gegan 394.		"	1	6.721.750.	6.486.725.	6.486.725.
B Grants payable Deterred revenue Deterred revenue Deterred revenue		17		7,100,7,100,1		TO THE THE THE STATE OF THE STA
19 Deferred revenue 2 Loans from officers, directors, trustees and other disqualified persons 2 Mortgages and other notes payable 2 Other liabilities (describe			· · · · · · · · · · · · · · · · · · ·			
20 Loans from officers, directors, trustees and other disqualified persons 21 Mortgages and other notes payable 22 Other liabilities (describe ►) 23 Total liabilities (add lines 17 through 22) Complete lines 24 through 26 and lines 30 and 31 Unrestricted 25 Temporarily restricted 26 Permanently restricted 27 Total and complete lines 27 through 31 28 Pad-in or capital surplus, or current funds 29 Pad-in or capital surplus, or land, bldg, and equipment fund 29 Pad-in or capital surplus, or land, bldg, and equipment funds 30 Total net assets or fund balances 31 Total liabilities and net assets/fund balances 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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) ► 3 Decreases not included in line 2 (itemize) ► 5 Decreases not included in line 2 (itemize) ► 5 Decreases not included in line 2 (itemize) ► 5 Fotal net assets or fund balances at end of year (line 4 minus line 5) - Part III, column (b), line 30 6 6 6, 486, 725.	"		· · ·	-		[1965] 李 泰太太军队
Total 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) Enter amount from Part I, line 27a Add lines 1, 2, and 3 Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 7 Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31 Unrestricted 25 Temporarily restricted 26 Permanently restricted 27 Temporarily restricted 28 Pard-in or capital stock, trust principal, or current funds 0	ţį					
Total 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) Enter amount from Part I, line 27a Add lines 1, 2, and 3 Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 7 Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31 Unrestricted 25 Temporarily restricted 26 Permanently restricted 27 Temporarily restricted 28 Pard-in or capital stock, trust principal, or current funds 0	ij					
23 Total liabilities (add lines 17 through 22) Poundations 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 27 Capital stock, trust principal, or current funds 28 Paid-in or capital surplus, or land, bldg., and equipment fund 29 Retained earnings, accumulated income, endowment, or other funds 30 Total 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) 20 Enter amount from Part I, line 27a 30 Other increases not included in line 2 (itemize) ▶ 31 Decreases not included in line 2 (itemize) ▶ 32 SEE STATEMENT 7 33 Fotal net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 4 Add lines 1, 2, and 3 5 Fotal net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 4 Fotal net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 4 Fotal net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 5 Fotal net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 5 Fotal net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 Fotal net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 Fotal net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 Fotal net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 Fotal net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 Fotal net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 Fotal net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 Fotal net ass	Ë					
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 27 Foundations that do not follow SFAS 117, check here and complete lines 27 through 31 28 Paid-in or capital surplus, or land, bldg., and equipment fund 29 Retained earnings, accumulated income, endowment, or other funds 30 Total net assets or fund balances 31 Total liabilities and net assets/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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) SEE STATEMENT 7 5 629, 394. 6 Cay 1, 750. 5 629, 394. 6 6, 486, 725.						
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 27 Capital stock, trust principal, or current funds 28 Paid-in or capital surplus, or land, bldg., and equipment fund 29 Retained earnings, accumulated income, endowment, or other funds 30 Total net assets or fund balances 1 Total liabilities and net assets/fund balances 1 Total of tassets 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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) 5 Decreases not included in line 2 (itemize) 5 Capital stock from the diances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 Capital stock from the diances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 Capital stock from the final stock from the fi		23	Total liabilities (add lines 17 through 22)	0.	0.	
and complete lines 24 through 26 and lines 30 and 31 24 Unrestricted 25 Temporarily restricted 26 Permanently restricted 27 Toundations that do not follow SFAS 117, check here Foundations that do not follow SFAS 117, check here Foundations that do not follow SFAS 117, check here Foundations that do not follow SFAS 117, check here Foundations that do not follow SFAS 117, check here Foundations that do not follow SFAS 117, check here Foundations that do not follow SFAS 117, check here Foundations that do not follow SFAS 117, check here Foundations that do not follow SFAS 117, check here Foundations that do not follow SFAS 117, check here Foundations that do not follow SFAS 117, check here XI and a complete lines 27 through 31 27 Capital stock, trust principal, or current funds 28 Paid-in or capital surplus, or land, bldg., and equipment fund 29 Retained earnings, accumulated income, endowment, or other funds 6,721,750. 6,486,725. Part III Analysis of Changes in Net Assets or Fund Balances 1 Total liabilities and net assets/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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) SEE STATEMENT 7 5 6 629, 394. 6 7 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 6 486, 725.						
24 Unrestricted 25 Temporarily restricted 26 Permanently restricted 27 Foundations that do not follow SFAS 117, check here and complete lines 27 through 31 28 Paid-in or capital stock, frust principal, or current funds 29 Retained earnings, accumulated income, endowment, or other funds 30 Total net assets or fund balances 31 Total liabilities and net assets/fund balances 4 Foundations that do not follow SFAS 117, check here and complete lines 27 through 31 4 Paid-in or capital surplus, or land, bldg., and equipment fund 5 Paid-in or capital surplus, or land, bldg., and equipment fund 6 Paid in et assets or fund balances 5 Paid-in or capital surplus, or land, bldg., and equipment fund 6 Paid in et assets or fund balances 6 Paid in et assets or fund balances 6 Paid in et assets or fund balances 7 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 7 Paid in et assets or fund balances at beginning of year - Part II, column (a), line 30 8 Paid in et assets or fund balances at beginning of year - Part II, column (a), line 30 9 Paid in et assets or fund balances at beginning of year - Part II, column (b), line 30 9 Paid in et assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 9 Paid in et assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 9 Paid in et assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 9 Paid in et assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 9 Paid in et assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 9 Paid in et assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 9 Paid in et assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30			· · · · · · · · · · · · · · · · · · ·			
25 Temporarily restricted 26 Permanently restricted 27 Capital stock, trust principal, or current funds 28 Paid-in or capital surplus, or land, bldg., and equipment fund 29 Retained earnings, accumulated income, endowment, or other funds 30 Total net assets or fund balances 4 Total net assets or fund balances 5 Changes in Net Assets or Fund Balances 5 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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) ▶ 5 Decreases not included in line 2 (itemize) ▶ 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 6 6, 486, 725. SEE STATEMENT 7 5 6 629, 394. 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 6 6, 486, 725.	es	24				
27 Capital stock, trust principal, or current funds 28 Paid-in or capital surplus, or land, bldg., and equipment fund 29 Retained earnings, accumulated income, endowment, or other funds 30 Total net assets or fund balances 30 Total net assets or fund balances 40 Capital stock, trust principal, or current funds 50 Capital stock, trust principal, or current funds 60 Capital stock, trust principal, or capital surplus, of	au au	25	Į.			
27 Capital stock, trust principal, or current funds 28 Paid-in or capital surplus, or land, bldg., and equipment fund 29 Retained earnings, accumulated income, endowment, or other funds 30 Total net assets or fund balances 30 Total net assets or fund balances 40 Capital stock, trust principal, or current funds 50 Capital stock, trust principal, or current funds 60 Capital stock, trust principal, or capital surplus, of	Bala	1	· · · · ·			
27 Capital stock, trust principal, or current funds 28 Paid-in or capital surplus, or land, bldg., and equipment fund 29 Retained earnings, accumulated income, endowment, or other funds 30 Total net assets or fund balances 30 Total net assets or fund balances 40 Capital stock, trust principal, or current funds 50 Capital stock, trust principal, or current funds 60 Capital stock, trust principal, or capital surplus, of	둳		·		. —	
28 Paid-in or capital surplus, or land, bidg., and equipment fund 29 Retained earnings, accumulated income, endowment, or other funds 30 Total net assets or fund balances 31 Total liabilities and net assets/fund balances 4 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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) 4 Add lines 1, 2, and 3 5 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 7 21, 750. 6 6, 486, 725. 1 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 6 6, 486, 725.	교		and complete lines 27 through 31			
Total net assets or fund balances 31 Total liabilities and net assets/fund balances 6,721,750. 6,486,725. 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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize)	ō	27	Capital stock, trust principal, or current funds	0.	0.	
Total net assets or fund balances 31 Total liabilities and net assets/fund balances 6,721,750. 6,486,725. 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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize)	sets	28	Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
Total net assets or fund balances 31 Total liabilities and net assets/fund balances 6,721,750. 6,486,725. 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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize)	Ass	29	Retained earnings, accumulated income, endowment, or other funds	6,721,750.	6,486,725.	
Total liabilities and net assets/fund balances 6,721,750. 6,486,725. 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	et	30	Total net assets or fund balances	6,721,750.		
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 6,721,750. 2 Enter amount from Part I, line 27a 2 394,369. 3 Other increases not included in line 2 (itemize) 3 0. 4 Add lines 1, 2, and 3 4 7,116,119. 5 Decreases not included in line 2 (itemize) SEE STATEMENT 7 5 629,394. 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 6,486,725.	_					
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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) 5 Decreases not included in line 2 (itemize) 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 1 6, 721, 750. 2 394, 369. 3 0. 4 7,116,119. 5 629,394.		31	Total liabilities and net assets/fund balances	6,721,750.	6,486,725.	
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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) 5 Decreases not included in line 2 (itemize) 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 1 6, 721, 750. 2 394, 369. 3 0. 4 7,116,119. 5 629,394.	ГР	art	III Analysis of Changes in Net Assets or Fund Ba	lances		
(must agree with end-of-year figure reported on prior year's return) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) ▶ 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ▶ 5 Decreases not included in line 2 (itemize) ▶ 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 1 6, 721, 750. 2 394,369. 3 0. 4 7,116,119. 5 629,394.						
3 Other increases not included in line 2 (itemize) ► 3 O. 4 Add lines 1, 2, and 3 4 7, 116, 119. 5 Decreases not included in line 2 (itemize) ► SEE STATEMENT 7 5 629, 394. 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 6, 486, 725.	1			30		6 701 750
3 Other increases not included in line 2 (itemize) ► 3 O. 4 Add lines 1, 2, and 3 4 7, 116, 119. 5 Decreases not included in line 2 (itemize) ► SEE STATEMENT 7 5 629, 394. 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 6, 486, 725.	_				 	0,/21,/50.
4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize)					 	
5 Decreases not included in line 2 (itemize) SEE STATEMENT 7 5 629,394. 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 6,486,725.	3					• • • • • • • • • • • • • • • • • • • •
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	4 E			כבב כתא		629 301
	<u>~</u>	rota	That about or fund buildhood at the or year time a minus line of a falt ii, to	normi (b), mio oo		

41793__1

Part IV Capital Gains a	nd Losses for Tax on In	vestment	Income				0 20,	C C C Tage C
	be the kind(s) of property sold (e g ehouse; or common stock, 200 shs			(b) Ho P - F D - I	w acquired Purchase Donation	(c) Date (mo., d	acquired lay, yr.)	(d) Date sold (mo , day, yr.)
1a PUBLICLY TRADED	SECURITIES-PUR	CHASED			P			
b PUBLICLY TRADED	SECURITIES-ACQU	JIRED E	SY			_		
c DONATION					D			
d CAPITAL GAINS D	OIVIDENDS							
_e	(n 0	4.00		1				
(e) Gross sales price	(f) Depreciation allowed (or allowable)		st or other basis expense of sale				iain or (loss) s (f) minus (
a 340,133.	(325,17	3.		(-)		14,960.
b				-				
c 176,466.		_	63,71	9.				112,747.
d 150,460.								150,460.
_e								
Complete only for assets showing	gain in column (h) and owned by	T					Col. (h) gain	
(1) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	. , ,	cess of col. (i)	İ	CC		not less thai (from col. (
	as 01 12/3 1/09	Over	col. (j), if any	-+			<u> </u>	14 060
<u>a</u>		 		-+				14,960.
b c				-				112,747.
d		 		-	<u> </u>		-	150,460.
e					-			
	∫ If gain, also ente	r in Part I. line		7				
2 Capital gain net income or (net cap)- ın Part I, line	, 7	♪∟	2			278,167.
3 Net short-term capital gain or (los	`							
If gain, also enter in Part I, line 8,		(-)		}				
If (loss), enter -0- in Part I, line 8 Part V Qualification Ur	nder Section 4940(e) for		Tau an Nati		3		N/A	- -
If section 4940(d)(2) applies, leave th Was the foundation liable for the sect If "Yes," the foundation does not quali	on 4942 tax on the distributable am fy under section 4940(e). Do not co	mplete this pa	rt					Yes X No
1 Enter the appropriate amount in e	ach column for each year, see the ir	istructions bei	ore making any er					(d)
Base period years	(b) Adjusted qualifying dis	stributions	Net value of no	(c) Incharita	ble-use assets	3		oution ratio
Calendar year (or tax year beginnin 2014	9 111)	4,746.			575,873		(col. (b) div	• 049384
2013		9,859.			779,302			.048424
2012		8,898.			708,163			.048617
2011	18	4,925.		4,	510,402	2.		.041000
2010	14	6,602.		3,	371,896	5.		.037863
2 Total of line 1, column (d)						2		.225288
3 Average distribution ratio for the 5	· ·	on line 2 by 5,	or by the number	of years	;			0.45.05.0
the foundation has been in existen	ce if less than 5 years					3		.045058
4. Enter the net value of nemehorsteh	a usa assata far 2015 from Dort V	line E						6,553,164.
4 Enter the net value of noncharitable	e-use assets for 2015 from Part X,	line 5				4		0,555,104.
5 Multiply line 4 by line 3						5		295,272.
3 Wantiply line 4 by line 3						"		23372720
6 Enter 1% of net investment incom	e (1% of Part I, line 27b)					6		3,801.
	, ,							
7 Add lines 5 and 6						7		299,073.
							1	
8 Enter qualifying distributions from	Part XII, line 4					8	<u> </u>	359,000.
	line 7, check the box in Part VI, line	e 1b, and comp	lete that part usin	g a 1%	lax rate			
See the Part VI instructions.								orm 990-PF (2015

	990-PF (2015) SMS FOUNDATION, INC.	<u> 20 - 1</u>	<u> 1878599</u>	<u> </u>	Page 4
	t VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 49	}48 - s	see instruc	tions	<u>s)</u>
	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)	\vdash		3 04	
	Domestic foundations that meet the section 4940(e) requirements in Part V, check here 🕨 🗶 and enter 1%	1		3,80	<u>J1.</u>
	of Part I, line 27b	ł			
	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		2 0/	0.
	Add lines 1 and 2	3		3,80	
	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4		2 0/	0.
	Tax based on investment income Subtract line 4 from line 3. If zero or less, enter -0-	5		3,80	<u> </u>
	Credits/Payments: 2015 estimated tax payments and 2014 overpayment credited to 2015 6 , 300.				
		1			
	Exempt foreign organizations - tax withheld at source Tax paid with application for extension of time to file (Form 8868) 6c	1			
	, ,	1			
	Backup withholding erroneously withheld Total credits and payments. Add lines 6a through 6d	7		6,30	<u> </u>
	Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached	8		0,50	.
	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		2,49	99.
	Enter the amount of line 10 to be: Credited to 2016 estimated tax 2,499. Refunded	11		<u>~ , </u>	0.
	t VII-A Statements Regarding Activities				<u> </u>
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene	ın		Yes	No
	any political campaign?		1a		X
	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 publishe		12 * 5		
	distributed by the foundation in connection with the activities			3 .	
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. ► \$ 0.	_	*, **		:
е	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation		△養≉	· '	
	managers. ► \$0.		<u> </u>	<u> </u>	
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?		2		X
	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, o	r	*	1	
	bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		3		X
	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	N	/ 3 4a	╁	
	If "Yes," has it filed a tax return on Form 990-T for this year? We there a liquidation termination discoulting or substantial contraction diving the year?	14 \		\vdash	<u>X</u>
	Was there a liquidation, termination, dissolution, or substantial contraction during the year?		5		$\frac{\Lambda}{}$
	If "Yes," attach the statement required by General Instruction T 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 	a law			
	remain in the governing instrument?		6	х	
	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	
•	The state of the		<u> </u>		
8a	Enter the states to which the foundation reports or with which it is registered (see instructions)				
_	WI				
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	Х	
	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for cale	ndar			
	year 2015 or the taxable year beginning in 2015 (see instructions for Part XIV)? If "Yes," complete Part XIV		9	$oxed{oxed}$	X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		10	لـــــا	X
			Form 99 0	n-PF/	(2015)

Na any time during the year, did the loundation, directly or indirectly, own a controlled entity within the meaning of section 5(20)(13)? If Yes, statch schedule (see instructions)	P	art VII-A Statements Regarding Activities (continued)			
section 52(0)(1392 If vest, altach schedule (see natructions) 10 did to foundation make a delichiouton is adors advised fund over which the foundation or a desgualided person had advisory privileges? If Yes, attach statement (see instructions) 10 did to foundation comply with the public respection requirements for its annual returns and exemption application? Whosh address > N/A 11 The books are in care of > THOMAS C. TIERNEY CPA 12 The books are in care of > THOMAS C. TIERNEY CPA 13 The books are in care of > THOMAS C. TIERNEY CPA 14 The books are in care of > THOMAS C. TIERNEY CPA 15 Section 4927(6)(1) increasing televished increase from 990 PF in lieu of Form 1041 - Check there and enter the amount of tax-exempla interest received in a care and enter the amount of tax-exempla interest received in a care and enter the amount of tax-exempla interest received in a care and enter the amount of tax-exempla interest received in a care and enter the amount of tax-exempla interest received in a care and enter the amount of tax-exempla interest received in a care and enter the amount of tax-exempla interest received in a care and enter the amount of tax-exempla interest received in a care and enter the amount of tax-exempla interest received in a care and enter the name of the form 1041 - Check there and enter the care of the form 1041 - Check there are an exception applies. 15 N/A 16 All any time during calendary year 2015, and the foundation and exemption and exemption of the secondary year 2015, and the foundation of exceptions and foundation and exemption and exemption and exemption of the foundation and exemption and exemption and exemption and exemption of the foundation and exemption and exempti				Yes	No
12 but the foundation make a distribution to a droor advised fund over which the foundation or a disqualried person had advisory privileges? 17	11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of			
If Yes, 'attach statement (see instructions') 12 X		section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
13 X	12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges?			
Website address N/A Telephone no 60 8 - 577 - 8260		If "Yes," attach statement (see instructions)	12		X
The books are in care of THOMAS G. TIERNEY, CPA Telephone no. \$60.8 - 577 - 82.60	13		13	Х	
Located at N 1010 HARRISON ST., MADISON, WI Section 48-7(a)t) nonexempt prior orm 980-PF in the usor form 1041-Check here and enter the amount of tax-exempt interest received or accrued during the year 16. All any time during celeratory sear 2015, did the foundation have an interest in or a signature or other authority over a bank, securities, or other hinancial account in a foreign counting? See the instructions for exceptions and filing requirements for FinCEN Form 114. If Yes, enter the name of the foreign counting to wheth instructions for exceptions and filing requirements for Which Form 4720 May Be Required File Form 4720 if any term is checked in the "Yes" column, unless an exception applies. 1a During the year did the foundation (either directly or indirectly); (1) Engage in the set is checked in the "Yes" column, unless an exception applies. 1a During the year did the foundation (either directly or indirectly); (1) Engage in the set is checked in the "Yes" column, unless an exception applies. 1a During the year did the foundation (either directly or indirectly); (1) Engage in the set is checked in the "Yes" column, unless an exception applies. 1a During the year did the foundation (either directly or indirectly); (1) Engage in the set is checked in the "Yes" column, unless an exception applies. 1a During the year did the foundation (either directly or indirectly); (1) Engage in the set is checked in the very set of checked to (or accept it from) a disqualited person? 2) Engage in the set of					
15 Section 4947(a)(1) nonemempt charitable invisit bling form 990-PF in lieu of Farm 1041 - Check here and enter the amount of tax exempt interest received or accrued during the year 16 All any time during celendar 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 the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country. Perform 4720 of any item is checked in the "Yes" column, unless an exception applies. File Form 4720 of any item is checked in the "Yes" column, unless an exception applies. 18 Barrow money from, lend money to, or otherwise extend credit for accept in from a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit for accept in from a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or remibures the excenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person (or make any of either available for the brenit or use of a disqualified person) (or make any of either available for the brenit or use of a disqualified person) (or make any of either available for the brenit or use of a disqualified person) (or make any of either available for the brenit or use of a disqualified person) (or make any of either available for the brenit or use of a disqualified person) (or make any of either available for the brenit or use of a disqualified person) (or make any of either available for the brenit or use of a disqualified person) (or make any of either available for the brenit or use of a disqualified person) (or pay money or propretty to a government official? (Exception Check No' if the foundation should propret to a government official? (Exception Check No' if the foundation official propretty to a government official? (Exception Check No') 18 pay to pay money or	14			<u> 260</u>	
and enter the amount of tax-exempt interest received or accrued during the year 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 the instructions for exceptions and filling 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 tem is checked in the "Yes" column, unless an exception applies. 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? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept time from) a disqualified person? (3) Firmish goods, services, or facilities to (or accept timen from) a disqualified person? (4) Pay compensation to, or pay or remburse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person (or make any) or tember of the expenses of, a disqualified person? (6) Agree to pay money or property to a government official? (Exception Chock 'No' (7) If the foundation angaged in make a grant to to temploy the official for a period after tarmination of government service, if terminating within 90 days.) (8) Agree to pay money or property to a government official? (Exception Chock 'No' (9) Agree to pay money or property to a government official? (Exception Chock 'No' (10) If the foundation angaged in a make a grant to to temploy the difficial for a period after tarmination of government service, if terminating within 90 days.) (9) Agree to pay money or property to a government official? (Exception Chock 'No' (10) If the foundation angaged in a prior year in any of the acts discribed in 1a, other than excepted acis, that were not corrected before the first day of the tax year beginning disaster assistance (see instructions)? (1) Are the end o			<u>711</u>		
16 A any time during calendar year 2015, and 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 the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country. Part VII.95 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. 1a Dump the year dot the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept if from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimbruse the expenses of a disqualified person? (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)? (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 80 days.). 1b If any answers in "Yes" to 14(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941 (6)-3 or in a current notice regarding disaster assistance (see instructions)? 1b If a set on the service is the service of the set o	15				•
See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ▶ Part VILIB_ Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 ff any tem is checked in the "Yes" column, unless an exception applies. 1a During the year did the foundation (either directly or indirectly): 11 Engage in the sale or exchange, or leasing of property with a disqualified person? Yes X No 12 During the year did the foundation (either directly or indirectly): 13 Furnish podds, services, or facilities to (or accept them from) a disqualified person? Yes X No 14 Pay compensation to, or pay or reimburss the expenses of, a disqualified person? Yes X No 15 Transfer any income or assets to a disqualified person (or make any) of either available for the benefit or use of a disqualified person (or make any) of either available for the benefit or use of a disqualified person (or make any) of either available for the benefit or use of a disqualified person (or make any) of either available for the benefit or use of a disqualified person (or make any) of either available for the benefit or use of a disqualified person (or make any) of either available for the benefit or use of a disqualified person (or make any) of either available for the benefit or use of a disqualified person (or make any) of either available for the benefit or use of a disqualified person (or make any) of either available for the benefit or use of a disqualified person (or make any) of either available for the benefit or use of a disqualified person for the available for the benefit or use of a disqualified person for the available for the make agrant to or the employer and the available for the available for the person			N		
See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the longing 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. 1a During the year did the toundation (either decidy or indirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualified person?	16			Yes	
Foreign country Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required			16	l	X
File Form 4720 if any Item is checked in the "Yes" column, unless an exception applies. 1				٠	
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 1a During the year did the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of properly with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (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)? (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.) b) If any answer is "Yes" to 1a(1)-(6), did any of the acts fall to qualify under the exceptions described in Regulations section 34/94(1/3) or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? In It was not failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(a) or 4942(h)(3). 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? If Yes, its the years I also the year's undistributed income? (if applying section 4942(a)(2) treating 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) If I Yes, its the years sundistributed income? (if applying section 4942(a)(2) to all years listed, answer 'No' and attach statement - see instructions) If the provisions of section 4942(a)(2) are being applie	Б.				
1a During the year did the toundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of prosprty with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (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) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any or either available for the foundation agreed to make a grant to or to employ the official? (Exception Check No" if the foundation service, if erriminating within 90 days.) b If any answer is "Yes" to 14(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 3.4941(0)-3 or in a current notice regarding disaster assistance check here c Did the foundation engage in a prior year in any of the acts static or approved assistance check here c Did the foundation engage in a prior year in any of the acts state for the exception of the second of the	<u> </u>		1		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (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) or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person) or 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.) b) If any answer is 'Yes' to lat(1)'(6), did any of the acts fall 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 (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? In the first day of the tax year beginning in 2015? The sace on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(3) or 4942(p(5)) and 4942(p(6)) or 4942(p(6)) or 4942(p(7)) or 49		· · · · · · · · · · · · · · · · · · ·	ļ	Yes	No
2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? 3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? 4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? 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)? 5) 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.) 5) If any answer is 'Yes' to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.491(d)-3 or in a current notice regarding disaster assistance (see instructions)? 7) If Yes and the companies of the companies 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? 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(0)(3) or 4942(0)(5). 2) 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? 2) Taxes on failure to distribute income (section 4942(a)(2) or all years listed, answer 'No' and attach statement - see instructions) 3) Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? 3) Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? 4) Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? 4) Did the foundation make any investment in a prior year (but after December 31, 1969) that could pepardize its charitable purpose that had not bee	1.		1	*,	
a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (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)? (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.) 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 Organizations relying on a current notice regarding disaster assistance (see instructions)? N/A To 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? Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(i)(3) or 4942(i)(15). A It 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? If "Yes," list the years \bigodetic lines are also assets) to the year's undistributed income? (If applying section 4942(a)(2) (or lating 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) If "Yes," list the years be the year's undistributed income? (If applying section 4942(a)(2) to all years listed in 2a, list the years here. In the provisions of section 4942(a)(2) are being applied to any of the year's listed in 2a, list the years here. In the provisions of section 4942(a)(a) are being applied to					
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (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 (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person? (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.) 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)? 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? Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(1)(3) or 4942(1)(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? 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 N/A c If the provisions of section 4942(a)(2) are being applied to any of the year's listed in 2a, list the year's here. Are there any years listed in 2a for which				,	<
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (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)? (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.) 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(0)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here Or but 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? Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942((3)) or 4942(ì	<u> </u>
(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)? (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, it terminating within 90 days.) 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 (see instructions)? 10 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? If "Yes," list the years \[\begin{array}{c} array					ľ <i>′</i>
for the benefit or use of a disqualified person)? (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.) b If any answer is 'Yes' to 1a(1)-(6), did any of the acts fall to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in 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? 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(i)(3) or 4942(i)(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? If 'Yes,' list the years b 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 assess) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer 'No' and attach statement - see instructions) c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. b during the year? 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 grift 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) 4a Did the foundation make any investment in a prior year (but after December 31, 1969				^~ }	* <
(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.) 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 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? 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(i)(3) or 4942(i)(5)). 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? If "Yes," list the years Islated 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) b If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.				1	
If the foundation agreed to make a grant to or to employ the official for a period after terrimitation of government service, if terrimitating within 90 days.) 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 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? 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(i)(3) or 4942(i)(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? If "Yes," list the years Issted 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 If "Yes," did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? If yes," did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year. If yes, "did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year. Yes X No b If "Yes," (did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year. A 2b If yes, "did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year. Yes X No b If "Yes," (did the foundation hold more than a 2% direct o			33.77		. 3
termination of government service, if terminating within 90 days.) 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)? 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? 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(i)(3) or 4942(i)(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? If "Yes," list the years 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 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.) 4a 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?			1 %		1
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 sheck here Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2015? Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(i)(3) or 4942(i)(5)). 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? If "Yes," list the years Yes X No If "Yes," list the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions) If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. 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 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 as a result of the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? But 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?			1	*	
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 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? 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? If 'Yes,' list the years \				A A	"
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? 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(i)(3) or 4942(i)(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? If "Yes," list the years Isted 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) c. If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. 3a. Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? Did the foundation the foundation and 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 grift 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) Ab. 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?			th		*
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? 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? If "Yes," list the years \		· · · · · · · · · · · · · · · · · · ·	10		4,3
before the first day of the tax year beginning in 2015? 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(i)(3) or 4942(i)(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? If Yes, I list the years \[Yes \] No 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) c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. 3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? b If "Yes," did it have excess business holdings in 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) 4b Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 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?			,		/{ ,3 ,
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(i)(3) or 4942(i)(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? If "Yes," list the years 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) c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. 3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? b If "Yes," did it have excess business holdings in 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) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2015? 4b X			10		х
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? If "Yes," list the years 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) C If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. D 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 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4b 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?	2				
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? If "Yes," list the years 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) c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. 3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? b If "Yes," did it have excess business holdings in 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 4a 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?					
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) c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.		At the end of tax year 2015, did the foundation have any undistributed income (fines 6d and 6e, Part XIII) for tax year(s) beginning			เม้
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 c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ——————————————————————————————————		before 2015?		<	
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 c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ——————————————————————————————————		If "Yes," list the years > , , , ,		4	
statement - see instructions) c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.		Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect	L		
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.					`
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? b If "Yes," did it have excess business holdings in 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) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4b 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?		statement - see instructions) N/A	_2b		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? b If "Yes," did it have excess business holdings in 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) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4b 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?		c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.	,		۲.
during the year? 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) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4b 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?		—			
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) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4b 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	3	· · · · · · · · · · · · · · · · · · ·			
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) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4b 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]		
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.) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4b 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					
Form 4720, to determine if the foundation had excess business holdings in 2015) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4b 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? N/A 4a X X					
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?4aXb 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?4bX		· /_	<u> </u>		
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		, ·· · ·- · · · · · · · · · · · ·			37
had not been removed from jeopardy before the first day of the tax year beginning in 2015?			4a		X
			<u> </u>		v
	—)_DE	

orm 990-PF (2015) SMS FOUNDATION, INC.			20-18785	99 Paç	ge 6
Part VII-B Statements Regarding Activities for Which	Form 4720 May Be R	equired (contin	ued)		
5a During the year did the foundation pay or incur any amount to:					\Box
(1) Carry on propaganda, or otherwise attempt to influence legislation (sec	tion 4945(e))?	Y	es X No		
(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indire	ectly,			
any voter registration drive?		Y	es X No		- 1
(3) Provide a grant to an individual for travel, study, or other similar purpos	ses?	Y	es X No		
(4) Provide a grant to an organization other than a charitable, etc., organization	ition described in section				İ
4945(d)(4)(A)? (see instructions)		Y	es X No		
(5) Provide for any purpose other than religious, charitable, scientific, litera	ary, or educational purposes, or f	or			
the prevention of cruelty to children or animals?		Y	es X No		
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify	under the exceptions described	ın Regulations	L		
section 53 4945 or in a current notice regarding disaster assistance (see ins	structions)?		N/A	5b	
Organizations relying on a current notice regarding disaster assistance chec	k here			,	
c If the answer is "Yes" to question 5a(4), does the foundation claim exemptio	n from the tax because it mainta	ıned			
expenditure responsibility for the grant?	ľ	1/A 🔲 Y	es 🔲 No		ı
If "Yes," attach the statement required by Regulations section 53 49)45-5(d)			ž.	
$\textbf{6a} \ \ \textbf{Did} \ \ \textbf{the foundation, during the year, receive any funds, directly or indirectly,}$	to pay premiums on			,	
a personal benefit contract?		Y	es 🗶 No 📙		
${f b}$ Did the foundation, during the year, pay premiums, directly or indirectly, on	a personal benefit contract?		⊢		X
If "Yes" to 6b, file Form 8870			I	7.5	
7a At any time during the tax year, was the foundation a party to a prohibited ta	ax shelter transaction?	Ye	es 🗶 No 📘		,
b If "Yes," did the foundation receive any proceeds or have any net income attr			N/A	7b	
Part VIII Information About Officers, Directors, Trus	stees, Foundation Mai	nagers, Highly			
Paid Employees, and Contractors	:			 -	
List all officers, directors, trustees, foundation managers and the		(c) Compensation	(d) Contributions to		
(a) Name and address	(b) Title, and average hours per week devoted	(If not paid,	(d) Contributions to employee benefit plans and deferred	(e) Expens account, oth	her
	to position	enter -0-)	compensation	allowance	<u>:S</u>
	\dashv			i	
SEE STATEMENT 9	\dashv	0.	0.		o .
OHO DIMININI)		<u> </u>			<u>·</u>
				ı	
· · · · · · · · · · · · · · · · · · ·				ı	
					—
Compensation of five highest-paid employees (other than those i	ncluded on line 1). If none,	enter "NONE."			
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week	(c) Compensation	(d) Contributions to employee benefit plans	(e) Expens account, oth	3e her
	devoted to position	(C) Compensation	and deterred compensation	allowance:	IS
NONE					-
- <u> </u>					
-	_				
		<u> </u>			_
Total number of other employees paid over \$50,000				000 05	0
			Form !	990-PF ₍₂₀	J15)

10200216 144198 41793

Form 990-PF (2015) SMS FOUNDATION, INC.		-1878599 Page 7
Part VIII Information About Officers, Directors, Trustees, Foundary Paid Employees, and Contractors (continued)	tion Managers, Highly	
3 Five highest-paid independent contractors for professional services. If none, ente	r "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		<u>▶</u> 0
Part IX-A Summary of Direct Charitable Activities		1
List the foundation's four largest direct charitable activities during the tax year. Include relevant static number of organizations and other beneficiaries served, conferences convened, research papers pro-	stical information such as the duced, etc.	Expenses
N/A		
		4
· · · · · · · · · · · · · · · · · · ·		-
Part IX-B Summary of Program-Related Investments	· · · · · · · · · · · · · · · · · · ·	
Describe the two largest program-related investments made by the foundation during the tax year or	lines 1 and 2	Amount
N/A		
		-
?		
		1
All other program-related investments. See instructions		
		1
Total. Add lines 1 through 3	•	0.
		Form 990-PF (2015)

	m 990-PF(2015) SMS FOUNDATION, INC.			20-	1878599	Page 8
Р	Minimum Investment Return (All domestic foundations me	ust complete	this part Foreign four	idations, s	ee 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	6,452	,711.
b	Average of monthly cash balances			1b	6,452 200	,247.
С	Fair market value of all other assets			1c		
đ	Total (add lines 1a, b, and c)			1d	6,652	,958.
е	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		<u>-</u>	2		0.
3	Subtract line 2 from line 1d			3	6,652	,958.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, s	see instructions	3)	4		,794.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on	Part V, line 4		5	6,553	,164.
6	Minimum investment return Enter 5% of line 5			6	327	,658.
P	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and	d (j)(5) private	operating foundations an	d certain		
	foreign organizations check here 🕨 🔃 and do not complete this part)					
1	Minimum investment return from Part X, line 6			1	327	<u>,658.</u>
2a	Tax on investment income for 2015 from Part VI, line 5	2a	3,801.			
b	Income tax for 2015 (This does not include the tax from Part VI.)	2b				
C	Add lines 2a and 2b			2c_	3	<u>,801.</u>
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	323	,857.
4	Recoveries of amounts treated as qualifying distributions		i	4		0.
5	Add lines 3 and 4			5	323	,857.
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 X	KIII, line 1		7	323	,857.
LP	Qualifying Distributions (see instructions)				- -	
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purpo	oses:				
а	Expenses, contributions, gifts, etc total from Part I, column (d), line 26			1a	359	<u>,000.</u>
b	Program-related investments - total from Part IX-B			1b		<u> </u>
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable	e, etc., purpose	S	2		
3	Amounts set aside for specific charitable projects that satisfy the:			, , ,		
а	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	d Part XIII, line	4	4	359	,000.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net invest	tment				
	income Enter 1% of Part I, line 27b			5		<u>,801.</u>
6	Adjusted qualifying distributions Subtract line 5 from line 4			6	355	,199.
	Note. The amount on line 6 will be used in Part V. column (h), in subsequent years wh	an calculation	whather the foundation of	ualifiee for t	he cartion	

Form **990-PF** (2015)

4940(e) reduction of tax in those years.

Part XIII Undistributed Income (s	see instructions)			
	(a)	(b)	(c)	(d)
1 Distributable amount for 2015 from Part XI,	Corpus	Years prior to 2014	2014	2015
line 7				323,857.
2 Undistributed income, if any, as of the end of 2015				
a Enter amount for 2014 only			214,484.	
b Total for prior years:				
· · · · · · · · · · · · · · · · · · ·		0.		*
3 Excess distributions carryover, if any, to 2015:				
a From 2010]			
b From 2011				
c From 2012	,	,		
d From 2013				,
e From 2014				
f Total of lines 3a through e	0.			· · · · · · · · · · · · · · · · · · ·
4 Qualifying distributions for 2015 from				*, \
Part XII, line 4. ► \$ 359,000.	· ·		*,	* t
a Applied to 2014, but not more than line 2a			214,484.	
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	7× 4 4 2 2 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4		, », .	144,516.
e Remaining amount distributed out of corpus	0.		· · · · · · · · · · · · · · · · · · ·	,
5 Excess distributions carryover applied to 2015	0.	·····		0.
(If an amount appears in column (d), the same amount must be shown in column (a))	<u> </u>			
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	4 3 33 4		,	~, · · · · · · · ·
line 4b from line 2b	· · · · · · · · · · · · · · · · · · ·	0.		
c Enter the amount of prior years'	ž 3			
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 instr	***		0.	*
f Undistributed income for 2015. Subtract				
lines 4d and 5 from line 1. This amount must	,	^		
be distributed in 2016	<u> </u>	*		179,341.
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	0.			•
	0.			
9 Excess distributions carryover to 2016 Subtract lines 7 and 8 from line 6a	0.			
	0.	<u></u>		
10 Analysis of line 9.				
a Excess from 2011	-			
b Excess from 2012				
c Excess from 2013				
d Excess from 2014				
e Excess from 2015				

523601 11-24-15

Supplementary information		-		
3 Grants and Contributions Paid During the Yo	ear or Approved for Future F	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	Purpose of grant or contribution	Amount
	or substantial contributor	recipient		
a Paid during the year				
SEE STATEMENT 10				
				359,000.
		ļ		
				
		l.		
Total	1	1	► 3a	359,000.
b Approved for future payment				
NONE				
			1	
		[
Total			► 3b	0.

Form 990-PF (2015) SMS FO	UNDATION, INC.	· <u></u>		20-1	L878599 Page 12
Part XVI-A Analysis of Inc	come-Producing Activities				
Enter gross amounts unless otherwise indic	ated Unrelated bus	siness income	Excluded by	section 512 513, or 514	(0)
	(a) Business	(b)	(C) xclu- sion	(d) Amount	(e) Related or exempt function income
1 Program service revenue:	code		code	741100111	Tanotton moonte
a					
b					
c			_	.=	-
d					
e					
East and contracts from government	2000000				
g Fees and contracts from government	agencies				
2 Membership dues and assessments					
3 Interest on savings and temporary cash					
Investments	-		14	120,122.	.
4 Dividends and interest from securities	ato:	*		120,122.	<u>.</u> *4: 32::
5 Net rental income or (loss) from real est	ate.			^ ' ×'	300 to 100 to
a Debt-financed property					·
b Not debt-financed property					
6 Net rental income or (loss) from persona	11				
property	 				
7 Other investment income					
8 Gain or (loss) from sales of assets other			18	181,237.	
than inventory	,		10	101,237	
9 Net income or (loss) from special events10 Gross profit or (loss) from sales of inver					
11 Other revenue:	itol y			-	· · · · · · · · · · · · · · · · · · ·
a b					
	1				
cd	i i				
е					
12 Subtotal. Add columns (b), (d), and (e)	*:	0.	(12)	301,359.	0.
13 Total. Add line 12, columns (b), (d), and	1(e)		<u>* . 1 </u>	13	301,359.
(See worksheet in line 13 instructions to ver					002,00
	of Activities to the Accompl	ishment of Exer	not Pur	noses	
	-				
	ivity for which income is reported in colu		ontributed i	mportantly to the accomp	plishment of
the foundation's exempt pur	rposes (other than by providing funds fo	r such purposes)			
		- 			
				-	
					
					
					<u> </u>

Form 990-PF (2		OUNDATION				20-187		age 13
Part XVII	Information Re Exempt Organ		sfers To a	ind Transactions	and Relations	hips With Nonchar	itable	
1 Did the or	ganization directly or indir	rectly engage in any	of the followin	ig with any other organizat	tion described in sec	tion 501(c) of	Yes	No
				7, relating to political orga		` '		
	from the reporting founda							
(1) Cash	, ,						1a(1)	Х
(2) Other							1a(2)	X
b Other tran							3,7	
	of assets to a noncharital	ble exempt organiza	tion				1b(1)	X
	nases of assets from a nor						1b(2)	Х
	al of facilities, equipment,		, gameanor				1b(3)	X
	bursement arrangements	0. 00. 0000.0					1b(4)	X
	s or loan guarantees						1b(5)	X
	rmance of services or me	mhership or fundrai	sino solicitatio	ns			1b(6)	X
	f facilities, equipment, ma						1c	X
-		•			always show the fair	market value of the goods,		
						n or sharing arrangement, s		
	i) the value of the goods, (od 1000 triair ian Triairtot va	ide in any transactio	in or snaring arrangement, c	11000 111	
(a) Line no	(b) Amount involved			e exempt organization	(d) Description	on of transfers, transactions, and	sharing arrangemen	nts
(4)	(D) ranoum myorrou	(0) 1141110	N/A	oxompt organization	(a) beserbite	or or autoro, and or or or or or or or or or or or or or	Sharing artangemen	
- 	N/A			-	 .			
								
+				7777				
	-					<u></u>		
						-		
						 		
								
								
				. .				
						·		
				or more tax-exempt organ	nizations described	_		_
ın section	501(c) of the Code (other	r than section 501(c)	(3)) or in sect	ion 527?		L	YesX	No
b lf <u>"</u> Yes," co	omplete the following sch							
	(a) Name of org	janization		(b) Type of organization	<u> </u>	(c) Description of relations	ship	
	N/A							
			`			<u> </u>		
		-						
1				accompanying schedules and taxpayer) is based on all inform			ay the IRS discuss t	his
Sign 👢	eller, it is true, correct, and com	S 1	parer (other than	taxpayer) is based on all imorn	nation of which preparer	ret	turn with the prepare own below (see inst	er
Here	Harch	C. Of		2-24-1	LI TRE		X Yes	No
Sigr	nature of officer or trustee			Date	Title			
	Print/Type preparer's na		Preparer's si	ignature	Date	Check if PTIN		
James E. Rose						self- employed		
Paid	JAMES E. R	OSE, CPA	JAMES	E. ROSE, CP	02/16/16	P0	0089463	
Preparer				W KRAUSE, LL		Firm's EIN ► 39-0		
Use Only				•				
	Firm's address ▶ PO	BOX 7398						
		DISON, WI		-7398		Phone no. 608.2	49.6622	

Schedule B

(Form 990, 990-EZ, or 990-PF)

Department of the Treasury Internal Revenue Service **Schedule of Contributors**

➤ Attach to Form 990, Form 990-EZ, or Form 990-PF.

► Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at www.irs.gov/form990.

OMB No 1545-0047

2015

Name of the organization

Employer identification number

Si	MS FOUNDATION, INC.	20-1878599
Organization type (check o		
Filers of:	Section:	
Form 990 or 990-EZ	501(c)() (enter number) organization	
	4947(a)(1) nonexempt charitable trust not treated as a private foundation	
	527 political organization	
Form 990-PF	X 501(c)(3) exempt private foundation	
	4947(a)(1) nonexempt charitable trust treated as a private foundation	
	501(c)(3) taxable private foundation	
, ,	is covered by the General Rule or a Special Rule.	See instructions
	on filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling yone contributor. Complete Parts I and II. See instructions for determining a contributor's	·
Special Rules		
sections 509(a)(1) any one contribute	on described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support to and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, o or, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amoun Z, line 1 Complete Parts I and II	r 16b, and that received from
year, total contrib	on described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from an utions of more than \$1,000 exclusively for religious, charitable, scientific, literary, or educatively to children or animals. Complete Parts I, II, and III	
year, contributions is checked, enter purpose Do not c	on described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from an sexclusively for religious, charitable, etc., purposes, but no such contributions totaled mothere the total contributions that were received during the year for an exclusively religious complete any of the parts unless the General Rule applies to this organization because it lie, etc., contributions totaling \$5,000 or more during the year	re than \$1,000 If this box , charitable, etc ,
but it must answer "No" or	that is not covered by the General Rule and/or the Special Rules does not file Schedule B in Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Fo to the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)	

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2015)

wanie ui ui	yanızatıdı	Employer identification number		
SMS F	OUNDATION, INC.		20-1878599	
Part I	Contributors (see instructions) Use duplicate copies of Part I if addition	al space is needed		
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contribution	(d) Type of contribution	
1	MATTHEW D. SILVERSTEIN PO BOX 5324 MADISON, WI 53705	\$76,5	Person Payroll Noncash X (Complete Part II for noncash contributions)	
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contribution	(d) Type of contribution	
2	MATTHEW D. SILVERSTEIN PO BOX 5324 MADISON, WI 53705	\$121,1	Person Payroll Noncash (Complete Part II for noncash contributions)	
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contribution	(d) Type of contribution	
3	MATTHEW D. SILVERSTEIN PO BOX 5324 MADISON, WI 53705	\$ <u>121,1</u>	Person Payroll Noncash (Complete Part II for noncash contributions)	
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contribution	(d)	
4	MATTHEW D. SILVERSTEIN PO BOX 5324 MADISON, WI 53705	\$160,00	Person X Payroll	
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contribution	(d) Type of contribution	
		\$	Person Payroll Noncash (Complete Part II for noncash contributions)	
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contribution	(d) s Type of contribution	
		\$	Person Payroll Noncash	

523452 10-26-15

Schedule B (Form 990, 990-EZ, or 990-PF) (2015)

(Complete Part II for noncash contributions)

Employer identification number

SMS FOUNDATION, INC.

20-1878599

Part II	Noncash Property (see instructions) Use duplicate copies of F	Part II if additional space is needed	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
	1,140 SHARES - CANADIAN NATIONAL		
		 \$ 76,528.	03/26/15
(a) No. from	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
	2,412 SHARES - FIRST EAGLE GLOBAL CLASS C		
		\$ 121,155.	12/23/15
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
	7,505 SHARES - FRONTIER TIMPANI SM CAP GR		
3		\$ 121,131.	12/23/15
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		V	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	0. 990-EZ. or 990-PF) (2

lame of orga	nization		Employer identification number
Part III	completing Part III, enter the total of exclusively religious	, charitable, etc. contributions of \$1,000 or less	20-1878599 section 501(c)(7), (8), or (10) that total more than \$1,000 for a line entry. For organizations is for the year. (Enter this info once).
7 3 81 1	Use duplicate copies of Part III if additiona	al space is needed	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
:			
		(e) Transfer of gift	
	Transferee's name, address, ar	nd ZIP + 4	Relationship of transferor to transferee
(a) No.			
from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
		(e) Transfer of gift	
-	Transferee's name, address, ar		Relationship of transferor to transferee
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
		(e) Transfer of gift	
	Transferee's name, address, ar		Relationship of transferor to transferee
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
		(e) Transfer of gift	
	Transferee's name, address, ar	nd ZIP + 4	Relationship of transferor to transferee

FORM 990-PF	GAIN OR	(LOSS) FF	ROM SALE	E OF AS	SETS		STA	TEMEN	т 1
(A) DESCRIPTION OF PROPI	ERTY				NNER UIRED	DAT ACQUI		DATE	SOLD
PUBLICLY TRADED SECT	JRITIES-PURO	CHASED		PURC	HASED				
(B)	(C)		(D)		(E)			(F)	
GROSS SALES PRICI	COST COTHER E		EXPENSE SALE		DEPRE	C.	GAIN	OR LO	oss
340,1	33. 32	25,173.		0.		0.		14	,960.
(A) DESCRIPTION OF PROPI	ERTY				NNER JIRED	DAT: ACQUI		DATE	SOLD
PUBLICLY TRADED SECU DONATION	JRITIES-ACQU	JIRED BY		DONA	ATED	-			
(B)	(C)		(D)	1 OF	(E)			(F)	
GROSS SALES PRICE	VALUE TIME OF		EXPENSE SALE		DEPRE	c. (GAIN	OR LO	oss
176,4	56. 16	0,649.		0.		0.		15,	,817.
CAPITAL GAINS DIVIDE	ENDS FROM PA	ART IV						150,	,460.
TOTAL TO FORM 990-PE	, PART I, I	INE 6A				_		181,	,237.
		- · · · · · · · · · · · · · · · · · · ·	<u></u>		· -				
FORM 990-PF	DIVIDENDS	AND INTE	REST FR	OM SECT	JRITIE	S	STA'	remen'	Г 2
SOURCE	GROSS AMOUNT	CAPITA GAINS DIVIDEN	R	(A) EVENUE R BOOKS		(B) INVES' T INCO		(C) ADJUS NET IN	STED
INVESTMENTS - CGD INVESTMENTS -	150,460.	150,4	160.	().		0.		
DIVIDENDS/INTEREST	120,122.		0.	120,122	2.	120,12	2.		
TO PART I, LINE 4	270,582.	150,4		120,122		120,12			

FORM 990-PF	LEGAL	FEES	S	TATEMENT 3
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME		
STAFFORD ROSENBAUM LLP- LEGAL/RESEARCH QUALIFYING DONEES	738.	0.		0.
TO FM 990-PF, PG 1, LN 16A	738.	0.		0.
FORM 990-PF	ACCOUNTI	NG FEES	S	TATEMENT 4
DESCRIPTION		(B) NET INVEST- MENT INCOME		(D) CHARITABLE PURPOSES
BAKER TILLY VIRCHOW KRAUSE, LLP - 2014 TAX RETURN PREPARATION	2,290.	2,290.		0.
TO FORM 990-PF, PG 1, LN 16B	2,290.	2,290.		0.
FORM 990-PF (OTHER PROFES	SIONAL FEES	S	TATEMENT 5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME		(D) CHARITABLE PURPOSES
BUTTONWOOD PARTNERS, INC INVESTMENT MANAGEMENT FEES	15,887.	15,887.		0.
TO FORM 990-PF, PG 1, LN 16C	15,887.	15,887.		0.

FORM 990-PF	TAX	ES	S	TATEMENT 6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
DEPT OF TREASURY: IRS-2014 EXCISE TAX BALANCE DUE DEPT OF TREASURY: IRS-2015	1,589.	0.		0.
EXCISE TAX ESTIMATED TAX PAYMENT	6,300.	0.		0.
TO FORM 990-PF, PG 1, LN 18	7,889.	0.	-	0.

FORM 990-PF OTHER DECREASES IN NET ASSETS OR I	FUND BALANCES	STATEMENT 7
DESCRIPTION		AMOUNT
CHANGE IN UNREALIZED GAINS ON INVESTMENTS		629,394.
TOTAL TO FORM 990-PF, PART III, LINE 5		629,394.
FORM 990-PF CORPORATE STOCK		STATEMENT 8
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
INVESTMENTS	6,180,891.	6,180,891.
TOTAL TO FORM 990-PF, PART II, LINE 10B	6,180,891.	6,180,891.

FORM 990-PF PAR	RECTORS	STAT	EMENT 9		
NAME AND ADDRESS		TITLE AND AVRG HRS/WK		EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
SARAH E. SPENCER PO BOX 5157 MADISON, WI 53705		PRESIDENT, DIRE	CTOR 0.	0.	0.
MATTHEW D. SILVERSTED PO BOX 5324 MADISON, WI 53705	ſΝ	VICE PRESIDENT, 1.00	DIRECTOR 0.	0.	0.
THOMAS G. TIERNEY 1010 HARRISON ST. MADISON, WI 53711		TREASURER 1.00	0.	0.	0.
DAVID B. BILLING PO BOX 1784 MADISON, WI 53701		SECRETARY 1.00	0.	0.	0.
MARK SPENCER PO BOX 5157 MADISON, WI 53705		DIRECTOR 1.00	0.	0.	0.
TOTALS INCLUDED ON 99	90-PF, PAGE 6,	PART VIII	0.	0.	0.

FORM 990-PF Part XV Supplementary Information STATEMENT 10
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	Foundation status of	Purpose of grant or	
Name and address (home or business)	or substantial contributor	recipient	contribution	Amount
Foundation for Madison Public Schools 455 Science Dirve Sie 130 Madison Wi	\/\	Public Chann	Educational purposes it the discretion of the chants	19 000
Hodan Center Inc 241 W. Fountam Street Mineral Point WI 53565-0212	٧/١	Public Charits	To be used at the discretion of the organization for their community rehabilitation programs for adults with disability	40 000
N OR 1-89-9 I°M 118-8 Bedford St Madison, N 1-53703	√/Λ	Public Charin	To assist in financing listener sposored community radio	5,000
Arrs Houzons One Grand Ave Suite 7 Englewood New Jeisev 07631	N/A	Public Charity	Support for airs programs for children	10,000
Dane County Humane Society 5132 Voges Road Madison (VI 53718	N/A	Public Charity	Care of homeless animals	10,000
Domestic Abuse Intervention Services PO Box 1761 Madison WT 53701	N/A	Public Charity	Provide assistance to people who have experienced domestic abuse	10,000
Kansas Circ Art Institute 4415 Warwick Boulevard Kansas Circ, AIO 64111	\/\	Public Charin	To educate the arrists and designers of fomoriou	5,000
Second Harvest Food Bank of Southern Wisconsin 2802 Daim Drive Madison Wi 53718	N/A	Public Charity	Vedrite and distribute tood to people in need	10,000
Samuel's House 1614 Truesdell Court Ney West, 17 - 33040	N/1	Public Charity	Provide housing for homeless women	5,000
Connections Counseling/University of Wisconsin 5505 University Avenue Madison (NT 53705	N/A	Public Charity	To assist in finding a program for recovery from drug/alcohol abuse which is conducive to hope and healing	5,000
Wisconsin Early Childhood Association 744 Williamson St Madison WI 53703	\ /\	Public Charity	Promote excellence in early education programs, support professionalism, call for greater public investment in early education.	5,000
The Smile Terin PO Box 96231 Washington DC 20090-6231	N/4	Public Charin	Provide free treatment for poor children with eleft and other medical problems	5,000
Urban Lague of Greater Madison 151 East Gorbam St Madison, W.1.53703	N/A	Public Charity	Improve the social and economic conditions of African Americans and other peoples of color and economically disadvantaged	5,000
Natural Resource Detense Council 40 West 20th Street New York, NY 10011	\ /A	Public, not for profit tax exempt organization	Sateguard the earth, its people, its plants and animals and the natural systems on which all life depends	5,000
ASPC \ 424 Last 92nd St \times \text{\text{Sork} \text{\tin}\text{\tint{\text{\tetx{\text{\texi}\text{\text{\texi{\text{\texi{\texi{\texi{\texi\texi{\text{\texi{\texi{\text{\texi{\texi{\texi{\texi{\texi{\texi{\texi{\texi{\texi{\texi{\	\ /A	Public Charits	Prevention of cruchy to animals	10,000
KIV V 3180 18th Sticet San Francisco, CA 94110	N/A	Public Charin	Connecting people through lending for the sake of aller ating povers	10,000
l nuc/Falsc Film Fest 5 South North St Suite 205 5 olumbia, NO 65201	\/ A	Public Charity	Support of cultimatic aris	2,500
Doctors Without Borders 333 7th Avenue, 2nd Floor New York NY 10001-5004	\/\	Public Charin	Medical aid to persons whose survival is threatened	10,000
Chief Blackbird Center 1 Maple Lane Odanah, WT 54861	\/\	Public Charity	Provide government services to tribal members	10,000
UNICET 125 Maiden Lane New York, NY 10038	\/\	Public Charin	Nurruring and crining for children	5,000

FORM 990-PF Part XV Supplementary Information STATEMENT 10
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	Found ttion status of	Purpose of grant or	
Name and address (home or business)	or substantial contributor	recipient	contribution	Amount
Keep Wisconsin Warm Fund	\/ \	Public Chairty	Providing heat and power to those most in need	5,000
PO Box 68	٠, .	T dishe saman	The state of the s	,,,,,,
Madison, WI 53701-0068				
Madison Museum of Contemporary Art	\/\	Public Chaury	Exhibit collect preserve and interpret modern and	5,000
227 State St			contemporars are	
Madison, W1 53705				
UW Madison School of Veterinary Medicine	\ /A	Public chaiin	Education	10 000
2015 Linden Dr Madison, WI 53706 1102				
Nature Conservance 4245 North Fairtax Dr	\/ A	Public Charity	Land and water consentation	5,000
Arlungton A \ 22203				
Malan Canada I and	S / S	Dulaha Chasan	Distance	10.000
Madison Community Loundation 2 Science Ct	\/ A	Public Chants	Philanthrops	10,000
Madison W1 53705 0010				
Nothing But Ners	\/ 4	Public Charin	Reduce malaria	5,000
LN Foundation	, -			,,,,,
1750 Pennsylvania Ave NW Washington, DC 20006				
Washington, DC 20000				
Berhany Apartments	N/A	Public Chairn	Transitional housing for victims of domestic abuse	5,000
806 Wisconsin We Racine, WI 33403				
Martha's Vineyard Animal Shelter 1 Pennywise Path	\ /A	Public Chairts	Provide shelter, care, love to domesticated homeless animals	5,000
Edgartown, NLV 02539			northeress anarrass	
Classic Law See on Ass New years at Carolin as Assemble	N1/1	Public Charin	Decrees how on a second of the second	10.000
Florida Keys Society for Prevention of Cruelty to Animals 5230 College Rd	\'/A	Public Charity	Promote humane treatment of all animals	10,000
Key West, FL 33040				
Planned Parenthood	N/A	Public Chants	Empower all individuals to manage their sexual and	10,000
302 N Jackson St	•		reproductive health	•
Milwaukce, WT 53202				
Arts for Arts	\/ 4	Public Charits	Support diversity in music and arts	7,500
107 Suttolk Street #3 5 New York, NY 10002				
New Tork, VI 10002				
Clean Lakes Alhanec	\/\	Public Charity	Improve water quality of lakes, streams and watersheds	5,000
150 E. Gilman St Madison, W1 53703				
YMC V of Danc County 8001 Excelsion Di	\/ .A	Public Charity	Build healthy confident connected and secure children adults, families and communities	10,000
Madison, WI 53717				
Oak Blutts Library	N/1	Public Charin	Building calland an year of	5.000
56R School St	N/ \	Public Charin	Building cultural awareness	5,000
Oak Blutts, M v 02557				
The Stone NYC	\/\	Public Chann	Support freedom of expression	7,500
200 E 10th St			.,	·
New York, NY 10003				
Recovers Foundation	\ /A	Public Charits	Support recovery from substance use disorders	5,000
5005 University Ave Madison, W1 53705				
Added Value	\/ A	Public Charin	Youth empowerment and environmental justice	10,000
PO Box 310028 Brooklyn, NY 11231				
Wisconsin Humanities Council 222 S. hedford St	\/\	Public Charity	Support and create programs that use history culture and discussion	10,000
Madison, WI 53703				
St. Coletra of Wisconsin	\/\	Public Charity	Create concernments for the cleaners will deabled a confe	5,000
>4637 Cr. Road \	\/ \ \	Tune Chain	Create opportunities for developmentally disabled people	2,1431,7
Jetterson, W1 53549				

FORM 990-PF Part XV Supplementary Infor 3 Grants and Contributions Paid During the Year of				STATEMENT 10
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
Make it Right Foundation 912 Magazini. St New Orleans, I. \ 70130	\/\	Public Charity	Build homes and communities for those in need	10 000
World Wildhife Fund 1250 24th St. SW. Washington, DC 20037	\/\	Public Chants	Protect the future of nature and wildlife	7,500
NOW Foundation PO Box 1848 Mcrmfeld, V V 22116-1848	\/ A	Public Charity	Support for women's rights issues	5,000
Hazelden Betty Ford Foundation PO Box 11, OS 3 Center City, NN 55012	\ /A	Public Charity	Removing barners to recovery from addiction	5 000
Dane County Parent Council 2006 Red Arrow Trail Madison WI 53711	\/\	Public Charity	Funding for the Head Start program	10,000
Lotal Contributions				359,000

Statement for the Period December 1, 2015 to December 31, 2015

SMS FOUNDATION - Corporation

Holdings

HOLDINGS > MUTUAL FUNDS - 96.08% of Total Account Value

Description	Symbol/Cusip Account Type	Quantity	Price on 12/31/15	Current Market Value	
Equity					
AMERICAN CAPITAL WORLD GRTH & INC A Estimated Yield 2.03% Dividend Option Reinvest Capital Gain Option Reinvest	CWGIX	7,568,412	\$43.36	\$328,166.34	
AMERICAN DEVELOPING WRLD GRWTH & INC A Estimated Yield 205% Dwdend Option Reinvest Cap tal Gain Option Reinvest	DWGAX CASH	18,456 89	\$8 42	\$155,407 01	
AMERICAN INCOME FUND OF AMERICA CLASS F1 Estimated Yield 318% Dividend Option Reinvest Capital Gain Option Reinvest	1 IFAFX CASH	8,414.971	\$20.18	\$169,814.11	
AMERICAN NEW WORLD FUND CLASS A Esn nated Yield 0.59% Dividend Option Reinvest Capital Gain Option Reinvest	NEWFX	6,961 632	S50.00	\$348,08160	

Statement for the Period December 1, 2015 to December 31, 2015 SMS FOUNDATION - Corporation

HOLDINGS > MUTUAL FUNDS cominmed

Sym Description Acc	Symbol/Cusip Account Type	Quantity	Price on 12/31/15	Current Market Value
AMERICAN WASHNTN MUTUAL INVESTRS CI. A Esumated Yield 193% Dwidend Option Reinvest Capital Gain Option Reinvest	AWSHX	12,655 349	\$38 44	\$486,471 62
FIDELITY 10W PRICEO STOCK Estimated Yield 129% Uwidend Option Rein- est Capital Gam Option Reinvest	FLPSX	2,477 354	S47 75	\$118 293,65
FIRST EAGLE FUND OF AMERICA CLASS C Dividend Option Reinvest Capital Gain Option Reinvest	FEAMX CASH	7,816 179	829,09	\$227,372.65
FIRST EAGLE GLOBAL CLASS C Dwidend Option Reinvest Capital Gain Option Reinvest	FESGX CASH	10,167 967	\$49.84	\$507,788 27
FIRST EAGLE GOLD CLASS A Owdend Opton Reurvest Capital Gan: Option Reinvest	SGGDX CASH	12,331 312	\$11.43	\$140,946.90
FRANKLIN BALANCE SHEET INVESTMENT A Estimated Yield 10 83% Dividend Option Reinvest Capital Gain Option Reinvest	FRBSX CASH	4,837,831	\$33 39	\$161,535 18
FRANKLIN GOLD AND PRECIOUS METALS CL A Dividend Option Reinvest Cepital Sam Option Reinvest	FKRCX CASH	6,060,266	\$11.01	\$66,723 53
FRANKLIN MUTUAL SHARES FUND CLASS C Estmated Yield 114% Dwidend Option Reinvest Capital Gain Obtion Reinvest	TEMTX	6,859,275	\$25.54	\$175,185,88
FRONTIER TIMPANI SMALL CAP GRWTH INSL Estimated Yield 139% Dividend Option Reinvest Capital Gem Option Reinvest	FTSGX CASH	18,064,489	\$15.97	\$288,489 89

Statement for the Period December 1, 2015 to December 31, 2015 SMS FOLINDATION - Corboration

HOLDINGS > MUTUAL FUNDS continued

	***	1							
Price on 12/31/15	\$59 43	\$36,53	\$14 00	89 68	\$22 11	\$32 60	\$34 55	\$10.90	\$10.43
Quantity	4,126,843	3,813,916	15,353,522	20,323,031	12,924 931	5,835 853	5,004 523	10,118 403	73,757,522
Symbol/Cusip Account Type	HAINX	JENSX CASH	FFECX CASH	FGNCX CASH	FRLCX	NSBCX	PRPFX	TCEMX CASH	TFMAX CASH
	HÄRBOR INTERNATIONAL INSTITUTIONAL FD Estunated Yield 181% Dividend Option Reinvest Cepital Gain Option Reinvest	JENSEN QUALITY GROWTH FD CL J Estimated Yield 128% Owtdend Option Reinvest Capital Gain Option Reinvest	NUVEEN DIVIDEND VALUE FD CL C Esturated Yield 173% Dividend Option Reinvest Capital Gain Option Reinvest	NUVEEN GLOBAL INFRASTRUCTURE CL C Estmated Yield 121% Owidend Option Reinvest Capital Gain Option Reinvest.	NUVEEN REAL ESTATE CLASS C Estruated Yield 1.91% Dividend Option Reinvost Capital Gem Option Reinvest	NUVEEN SANTA BARBARA DIVIDEND GRWTH CL C Estimated Yield 0 79% Owidend Option Reinvest Capital Gain Option Reinvest	PERMANENT PORTFOLIO Estimated Yield 1.18% Dividend Option Reinvest Capital Gam Option Reinvest	TEMPLETON EMERGING MRKTS SMALL CAP C Dividend Option Remyest Capital Gain Option Reinyest	TEMPLETON FRONTIER MARKETS FUND CL A Estimated Yield 7 45% Dwidond Option Reinvest Capital Gain Option Reinvest

Statement for the Period December 1, 2015 to December 31, 2015 SMS FOUNDATION - Corporation

HOLDINGS > MUTUAL FUNDS continued

	Symbol/Cusip Account Type	Onsettty	Price on 12/31/15	Current
VANGUARD/WFLI ESI EY INCOME INVESTOR Lstimated Yield 311% Dwidend Option Reinvest Capital Gam Option Reinvest	VWINK	0.161.77	\$24.52	S151,086 66 -
Total Equity	4 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	** ************************************		\$5.128.830.18
Fixed Income				
FRANKLIN US GOV'T CLASS A Fsmared Yield 331°a Dividend Option Remyest Capital Gain Option Remyest	FKUSX CASH	29,878 056	\$6.35	\$189,729.47
NUVFFN PREFERRED SECURITIES CI C Estimated Yield 475% Dividend Option Reinvest Caoital Gain Option Reinvest	NPSCX CASH	11,171,899	\$16.93	\$189,140.25
NUVEEN SYMPHONY CREDIT OPPTY C SHRS Estimated Yield 598% Dividend Option Reinvest Capital Gain Option Reinvest	NCFCX	7,248 392	\$1818	\$131,775
TEMPLETON GLOBAL BOND CLASS A Estimated Yield 3 13% Dividend Option Reinvest Capital Gain Opt <u>ior Reinvest</u>	TPINX	73,512,882	\$11,58	\$272 279 17
TEMPLETON GLOBAL TOTAL RETURN CI C Estimated Yield 3 63%. Dividend Option Reinvest Capital Gain Option Reinvest	TTRCX CASH	11,022 475	\$11.46	\$126317,56
VANGUARD INFLATION PROTECTED SFCS INV Estimated Yield 152% Dividend Option Reinvest Capital Gain Option Reinvest	VIPSX	11,122,905	312 84	\$142,818 10
Total Fixed Income		Stockhambo Corres o Cappello		\$1,052,060.32
Total Mutual Funds				\$6,180,890 50

Statement for the Period December 1, 2015 to December 31, 2015

SMS FOUNDA FION - Corporation

HOLDINGS Londinued

Current Market Value	\$6,180,890 50
Price on 12/31/15	
Quantity	
	Total Securities

TOTAL PORTFOLIO VALUE

\$6,432,858.80