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## Return of Private Foundation

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

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► Information about Form 990-PF and its separate instructions is at [www.irs.gov/form990pf](http://www.irs.gov/form990pf).

2015

For calendar year 2015 or tax year beginning

, and ending

Name of foundation

BAILEY &amp; LUCY EVANS FOUNDATION

Number and street (or P O box number if mail is not delivered to street address)

P.O. BOX 291947

A Employer identification number

20-6605288

B Telephone number

615-690-1412

C If exemption application is pending, check here ► D 1. Foreign organizations, check here ► 2. Foreign organizations meeting the 85% test, check here and attach computation ► E If private foundation status was terminated under section 507(b)(1)(A), check here ► F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ► G Check all that apply:  Initial return  Initial return of a former public charity  
 Final return  Amended return  
 Address change  Name changeH Check type of organization:  Section 501(c)(3) exempt private foundation  
 Section 4947(a)(1) nonexempt charitable trust  Other taxable private foundationI Fair market value of all assets at end of year **406,823.** (Part I, column (d) must be on cash basis.) **J Accounting method:**  Cash  Accrual  
(from Part II, col (c), line 16)  Other (specify)

Part I Analysis of Revenue and Expenses		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received			N/A	
	2 Check ► <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B interest on savings and temporary cash investments				
	3 Dividends and interest from securities	10,306.	9,619.		STATEMENT 1
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10 Gross sales price for all assets on line 6a	109.			
	6b 60,668.				
	7 Capital gain net income (from Part IV, line 2)		109.		
	8 Net short-term capital gain				
	9 Income modifications Gross sales less returns and allowances				
	10a b Less Cost of goods sold				
	c Gross profit or (loss)				
Operating and Administrative Expenses	11 Other income				
	12 Total. Add lines 1 through 11	10,415.	9,728.		
	13 Compensation of officers, directors, trustees, etc	4,428.	2,214.		2,214.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees				
	b Accounting fees	STMT 2	1,150.	575.	575.
	c Other professional fees				
	17 Interest				
	18 Taxes	STMT 3	52.	52.	0.
	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	57,630.	2,841.		2,789.
	25 Contributions, gifts, grants paid	21,763.			21,763.
	26 Total expenses and disbursements. Add lines 24 and 25	27,393.	2,841.		24,552.
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	<16,978. >			
	b Net investment income (if negative, enter -0-)		6,887.		
	c Adjusted net income (if negative, enter -0-)			N/A	

	Part II Balance Sheets	Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing				
	2 Savings and temporary cash investments		20,332.	40,911.	40,911.
	3 Accounts receivable ►				
	Less: allowance for doubtful accounts ►				
	4 Pledges receivable ►				
	Less: allowance for doubtful accounts ►				
	5 Grants receivable				
	6 Receivables due from officers, directors, trustees, and other disqualified persons				
	7 Other notes and loans receivable ►				
	Less: allowance for doubtful accounts ►				
	8 Inventories for sale or use				
	9 Prepaid expenses and deferred charges				
	10a Investments - U.S. and state government obligations				
	b Investments - corporate stock				
	c Investments - corporate bonds				
Liabilities	11 Investments - land, buildings, and equipment basis ►				
	Less accumulated depreciation ►				
	12 Investments - mortgage loans				
	13 Investments - other	STMT 4	381,199.	343,719.	365,912.
	14 Land, buildings, and equipment basis ►				
	Less accumulated depreciation ►				
	15 Other assets (describe ► )				
	16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		401,531.	384,630.	406,823.
	17 Accounts payable and accrued expenses				
	18 Grants payable				
Net Assets or Fund Balances	19 Deferred revenue				
	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)		0.	0.	
	Foundations that follow SFAS 117, check here ► <input type="checkbox"/>				
	and complete lines 24 through 26 and lines 30 and 31.				
	24 Unrestricted				
	25 Temporarily restricted				
	26 Permanently restricted				
Net Assets or Fund Balances	Foundations that do not follow SFAS 117, check here ► <input checked="" type="checkbox"/>				
	and complete lines 27 through 31.				
	27 Capital stock, trust principal, or current funds		401,531.	384,630.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund		0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds		0.	0.	
	30 Total net assets or fund balances		401,531.	384,630.	
	31 Total liabilities and net assets/fund balances		401,531.	384,630.	

## 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	401,531.
2 Enter amount from Part I, line 27a	2	<16,978.>
3 Other increases not included in line 2 (itemize) ► <u>TAX EFFECTIVE DATE TRANSACTIONS</u>	3	77.
4 Add lines 1, 2, and 3	4	384,630.
5 Decreases not included in line 2 (itemize) ►	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	384,630.

**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a SEE ATTACHED SCHEDULE		P	VARIOUS	VARIOUS
b SEE ATTACHED SCHEDULE		P	VARIOUS	VARIOUS
c CAPITAL GAINS DIVIDENDS				
d				
e				
(e) Gross sales price		(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	7,338.		8,491.	<1,153.>
b	50,904.		52,068.	<1,164.>
c	2,426.			2,426.
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any		
a				<1,153.>
b				<1,164.>
c				2,426.
d				
e				
2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }		2	109.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8			3	N/A

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

 Yes  No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2014	24,941.	432,359.	.057686
2013	23,747.	426,351.	.055698
2012	25,523.	416,139.	.061333
2011	27,225.	429,981.	.063317
2010	25,382.	413,482.	.061386

2 Total of line 1, column (d)

2 .299420

3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years

3 .059884

4 Enter the net value of noncharitable-use assets for 2015 from Part X, line 5

4 412,449.

5 Multiply line 4 by line 3

5 24,699.

6 Enter 1% of net investment income (1% of Part I, line 27b)

6 69.

7 Add lines 5 and 6

7 24,768.

8 Enter qualifying distributions from Part XII, line 4

8 24,552.

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

**Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)**1a Exempt operating foundations described in section 4940(d)(2), check here ►  and enter "N/A" on line 1.

Date of ruling or determination letter: \_\_\_\_\_ (attach copy of letter if necessary-see instructions)

b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ►  and enter 1% of Part I, line 27b

c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).

2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)

3 Add lines 1 and 2

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

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

## 6 Credits/Payments:

a 2015 estimated tax payments and 2014 overpayment credited to 2015

6a 969.

b Exempt foreign organizations - tax withheld at source

6b

c Tax paid with application for extension of time to file (Form 8868)

6c

d Backup withholding erroneously withheld

6d

7 Total credits and payments. Add lines 6a through 6d

8 Enter any **penalty** for underpayment of estimated tax. Check here  if Form 2220 is attached9 Tax due. If the total of lines 5 and 8 is more than line 7, enter **amount owed**10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid**

11 Enter the amount of line 10 to be: Credited to 2016 estimated tax ►

831. Refunded

11 0.

**Part VII-A Statements Regarding Activities**

1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?

1a X

b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)?  
*If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.*

1b X

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. ► \$ 0. (2) On foundation managers. ► \$ 0.

e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ► \$ 0.

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

2 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, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*

3 X

4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?

4a X

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

N/A

5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?

4b X

*If "Yes," attach the statement required by General Instruction T.*

6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:

5 X

- By language in the governing instrument, or
- By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?

6 X

7 Did the foundation have at least \$5,000 in assets at any time during the year? *If "Yes," complete Part II, col. (c), and Part XV*

7 X

8a Enter the states to which the foundation reports or with which it is registered (see instructions) ►

TN

b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? *If "No," attach explanation*

8b X

9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2015 or the taxable year beginning in 2015 (see instructions for Part XIV)? *If "Yes," complete Part XIV*

9 X

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

10 X

## Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Website address ► <b>N/A</b>			
14	The books are in care of ► <b>PINNACLE BANK C/O SCOTT LINDSEY</b> Located at ► <b>P.O. BOX 291947, NASHVILLE, TN</b>	Telephone no. ► <b>615-690-1412</b>	ZIP+4 ► <b>37229-1947</b>
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year	► <b>15</b> <b>N/A</b>	
16	At any time during calendar year 2015, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ►	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No

## Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
1a	During the year did the foundation (either directly or indirectly):		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here	► <b>N/A</b>	
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?	► <b>1b</b>	
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 ►	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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.)	► <b>N/A</b>	
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>2b</b>	
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b	If "Yes," did it have excess business holdings in 2015 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015.)	► <b>3b</b>	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	► <b>N/A</b>	
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?	► <b>4a</b>	
		► <b>4b</b>	

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

5a During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?  Yes  No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?  Yes  No

(3) Provide a grant to an individual for travel, study, or other similar purposes?  Yes  No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions)  Yes  No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?  Yes  No

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

Organizations relying on a current notice regarding disaster assistance check here

N/A



5b

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

N/A

Yes  No

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

Yes  No

6b



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

If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

Yes  No

N/A

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

7b

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

1 List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
PINNACLE BANK P.O. BOX 291947 NASHVILLE, TN 37229	TRUSTEE  3.00	4,428.	0.	0.

2 Compensation of five highest-paid employees (other than those included 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 devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

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



0

**Part VIII** **Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**
**3 Five highest-paid independent contractors for professional services. If none, enter "NONE."**

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
<b>NONE</b>		

**Total number of others receiving over \$50,000 for professional services**

0

**Part IX-A Summary of Direct Charitable Activities**

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

Expenses

1	<b>N/A</b>	
2		
3		
4		

**Part IX-B Summary of Program-Related Investments**

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

Amount

1	<b>N/A</b>	
2		
3	All other program-related investments. See instructions.	
<b>Total. Add lines 1 through 3</b>		0.

Form 990-PF (2015)

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

1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a Average monthly fair market value of securities	1a	394,647.
b Average of monthly cash balances	1b	24,083.
c Fair market value of all other assets	1c	
d Total (add lines 1a, b, and c)	1d	418,730.
e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2 Acquisition indebtedness applicable to line 1 assets	2	0.
3 Subtract line 2 from line 1d	3	418,730.
4 Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	6,281.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	412,449.
6 Minimum investment return. Enter 5% of line 5	6	20,622.

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

1 Minimum investment return from Part X, line 6	1	20,622.
2a Tax on investment income for 2015 from Part VI, line 5	2a	138.
b Income tax for 2015. (This does not include the tax from Part VI.)	2b	
c Add lines 2a and 2b	2c	138.
3 Distributable amount before adjustments. Subtract line 2c from line 1	3	20,484.
4 Recoveries of amounts treated as qualifying distributions	4	0.
5 Add lines 3 and 4	5	20,484.
6 Deduction from distributable amount (see instructions)	6	0.
7 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	20,484.

**Part XII****Qualifying Distributions** (see instructions)

1 Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	24,552.
b Program-related investments - total from Part IX-B	1b	0.
2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3 Amounts set aside for specific charitable projects that satisfy the:		
a Suitability test (prior IRS approval required)	3a	
b Cash distribution test (attach the required schedule)	3b	
4 Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	24,552.
5 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6	24,552.

Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

**Part XIII Undistributed Income** (see instructions)

	(a) Corpus	(b) Years prior to 2014	(c) 2014	(d) 2015
1 Distributable amount for 2015 from Part XI, line 7				20,484.
2 Undistributed income, if any, as of the end of 2015			0.	
a Enter amount for 2014 only				
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2015:				
a From 2010	5,000.			
b From 2011	6,414.			
c From 2012	5,003.			
d From 2013	3,608.			
e From 2014	3,554.			
f Total of lines 3a through e	23,579.			
4 Qualifying distributions for 2015 from Part XII, line 4: ► \$ 24,552.			0.	
a Applied to 2014, but not more than line 2a				
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	4,068.			20,484.
e Remaining amount distributed out of corpus	0.			0.
5 Excess distributions carryover applied to 2015 (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:	27,647.			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5		0.		
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 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				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2010 not applied on line 5 or line 7	5,000.			
9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a	22,647.			
10 Analysis of line 9:				
a Excess from 2011	6,414.			
b Excess from 2012	5,003.			
c Excess from 2013	3,608.			
d Excess from 2014	3,554.			
e Excess from 2015	4,068.			



## Part XV Supplementary Information (continued)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<i>a Paid during the year</i>				
A BRIDGE OF HOPE P.O. BOX 3960 CORDOVA, TN 38088			GENERAL OPERATING EXPENSES	1,000.
BEDFORD COUNTY ARTS COUNCIL 204 S MAIN ST SHELBYVILLE, TN 37160			GENERAL OPERATING EXPENSES	1,000.
UNITED WAY OF BEDFORD COUNTY P.O. BOX 1438, 605 DELRAY STREET SHELBYVILLE, TN 37162			GENERAL OPERATING EXPENSES	3,000.
BELIEVERS FAITH FELLOWSHIP 1293 CHURCH STREET CHRISTIANA, TN 37037			GENERAL OPERATING EXPENSES	1,000.
CASA WORKS INC 224 WEST FORT ST MANCHESTER, TN 37355			GENERAL OPERATING EXPENSES	2,000.
<b>Total</b>	<b>SEE CONTINUATION SHEET(S)</b>			► 3a <b>21,763.</b>
<i>b Approved for future payment</i>				
NONE				
<b>Total</b>				► 3b <b>0.</b>

## Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	10,306.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	109.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)	0.		10,415.	0.	
13 Total. Add line 12, columns (b), (d), and (e)	13				10,415.
(See worksheet in line 13 instructions to verify calculations.)					

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

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



## Part XV Supplementary Information

## 3 Grants and Contributions Paid During the Year (Continuation)

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
CHILD DEVELOPMENT CENTER 111 EAGLETTTE BLVD SHELBYVILLE, TN 37160			GENERAL OPERATING EXPENSES	2,000.
COMMUNITY OUTREACH PARTNERSHIP 228 WOODLAND DRIVE SHELBYVILLE, TN 37160			GENERAL OPERATING EXPENSES	2,000.
FAMILY SUPPORT PROGRAM OF TENNESSEE 400 DEADERICK STREET NASHVILLE, TN 37243			GENERAL OPERATING EXPENSES	2,000.
JUNIOR'S HOUSE, INC. 704 W. MAPLE STREET FAYETTEVILLE, TN 37334			GENERAL OPERATING EXPENSES	1,500.
SHELBYVILLE FIRE DEPARTMENT 111 LANE PARKWAY SHELBYVILLE, TN 37160			GENERAL OPERATING EXPENSES	350.
SPECIAL KIDS 2208 E. MAIN STREET MURFREESBORO, TN 37130			GENERAL OPERATING EXPENSES	800.
FIRST PRESBYTERIAN CHURCH 600 N BRITTAINT ST SHELBYVILLE, TN 37160			GENERAL OPERATING EXPENSES	2,500.
SHELBYVILLE HIGH SCHOOL 401 EAGLE BLVD SHELBYVILLE, TN 37160			GENERAL OPERATING EXPENSES	2,613.
Total from continuation sheets				13,763.

FORM 990-PF

DIVIDENDS AND INTEREST FROM SECURITIES

STATEMENT

1

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
PINNACLE BANK	12,732.	2,426.	10,306.	9,619.	
TO PART I, LINE 4	12,732.	2,426.	10,306.	9,619.	

FORM 990-PF

ACCOUNTING FEES

STATEMENT

2

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	1,150.	575.		575.
TO FORM 990-PF, PG 1, LN 16B	1,150.	575.		575.

FORM 990-PF

TAXES

STATEMENT

3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES PAID	52.	52.		0.
TO FORM 990-PF, PG 1, LN 18	52.	52.		0.

FORM 990-PF

OTHER INVESTMENTS

STATEMENT

4

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
PUBLICLY TRADED SECURITIES	COST	343,719.	365,912.
TOTAL TO FORM 990-PF, PART II, LINE 13		343,719.	365,912.

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION  
PART XV, LINES 2A THROUGH 2D

STATEMENT 5

## NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

MR. WAYNE BOMAR, BOARD OF ELDERS  
FIRST PRESBYTERIAN CHURCH, 600 N BRITTAIN ST.  
SHELBYVILLE, TN 37160

## FORM AND CONTENT OF APPLICATIONS

LETTER DESCRIBING THE PURPOSE OF THE ORGANIZATION AND EXPECTED FIT OF THE PROGRAM

## ANY SUBMISSION DEADLINES

JUNE 1ST

## RESTRICTIONS AND LIMITATIONS ON AWARDS

A 501(C)(3) ORGANIZATION IN GOOD STANDING WITHOUT PREFERENCE TO RELIGOUS AFFILIATION

ACCT D43K 1045000148  
 FROM 01/01/2015  
 TO 12/31/2015

DAVID & CO. NOMINEE  
 STATEMENT OF CAPITAL GAINS AND LOSSES  
 STUA BAILEY & LUCY EVANS FOUNDATION  
 TRUST YEAR ENDING 12/31/2015

PAGE 41  
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TAX PREPARER: 4020  
 TRUST ADMINISTRATOR: 106  
 INVESTMENT OFFICER: 302

LEGEND: F - FEDERAL S - STATE I - INHERITED  
 E - EXEMPT FROM STATE U - ACQ COST UNKNOWN

PROPERTY DESCRIPTION	SHARES	DATE	SALES PRICE	COST BASIS	GAIN/LOSS	MARKET DISCOUNT	TERM NC	8949
49.0000 ALTRIA GROUP INC COM - 02209S103 - MINOR = 50								
SOLD 03/13/2015			2516.11					
ACQ 36.0000 05/23/2013			1848.57	1327.07	521.50	0.00	LT	F
6.0000 06/05/2013			410.79	288.10	122.69	0.00	LT	F
5.0000 01/27/2014			256.75	185.44	71.31	0.00	LT	F
13.0000 APPLE INC COM - 03783S100 - MINOR = 50								
SOLD 04/27/2015			1722.50					
ACQ 13.0000 05/23/2013			1722.50	825.46	897.04	0.00	LT	F
.8000 CHEMOURS CO/THE - 163851108 - MINOR = 50								
SOLD 07/08/2015			8.94					
ACQ .8000 01/27/2014			8.94	11.70	-2.76	0.00	LT	F
4.0000 CHEMOURS CO/THE - 163851108 - MINOR = 50								
SOLD 09/25/2015			28.72					
ACQ 4.0000 01/27/2014			28.72	58.47	-29.75	0.00	LT	F
160.0000 FREEPORT-MCMORAN COPPER & GOLD COM - 35671D857 - MINOR = 50								
SOLD 01/30/2015			2697.75					
ACQ 154.0000 08/29/2013			2596.58	4689.92	-2093.34	0.00	LT	F
6.0000 01/27/2014			101.17	195.49	-94.32	0.00	LT	F
27.0000 ISHARES SELECT DIVIDEND ETF INDEX FD - 464287168 - MINOR = 57								
SOLD 04/27/2015			2128.64					
ACQ 27.0000 01/30/2015			2128.64	2157.03	-28.39	0.00	ST	C
33.0000 ISHARES SELECT DIVIDEND ETF INDEX FD - 464287168 - MINOR = 57								
SOLD 08/06/2015			2502.34					
ACQ 33.0000 01/30/2015			2502.34	2636.37	-134.03	0.00	ST	C
67.0000 KRAFT HEINZ CO - 500754106 - MINOR = 50								
SOLD 08/06/2015			5353.87					
ACQ 12.0000 05/23/2013			958.90	684.25	274.65	0.00	LT	F
7.0000 06/05/2013			559.36	378.64	180.72	0.00	LT	F
48.0000 10/04/2013			3835.61	2559.81	1275.80	0.00	LT	F
28.0000 LILLY ELI & CO COM - 532457108 - MINOR = 50								
SOLD 09/25/2015			2356.28					
ACQ 28.0000 02/28/2014			2356.28	1666.84	689.44	0.00	LT	F
80.0000 MATTEL INC COM - 577081102 - MINOR = 50								
SOLD 01/30/2015			2195.98					
ACQ 80.0000 04/16/2014			2195.98	3067.04	-871.06	0.00	ST	C
11000.0000 MORGAN STANLEY DTD 11/02/10 3.45% 11/02/ - 61747YCTO - MINOR = 45								
SOLD 11/02/2015			11000.00					
ACQ 11000.0000 05/04/2013			11000.00	11000.00	0.00	0.00	LT	F
20000.0000 SOUTHWESTERN ELECTRIC POWER SENIOR 4.9% 0 - 845437BG6 - MINOR = 45								
SOLD 07/01/2015			20000.00					
ACQ 20000.0000 05/28/2013			20000.00	20000.00	0.00	0.00	LT	F
25.0000 TARGET CORP COM - 87612E106 - MINOR = 50								
SOLD 04/02/2015			2058.01					
ACQ 25.0000 02/28/2014			2058.01	1562.75	495.26	0.00	LT	F
177.0000 TEXTAINER GROUP HOLDINGS LTD - G8766E109 - MINOR = 50								
SOLD 11/05/2015			2582.38					
ACQ 35.0000 04/05/2013			510.64	1385.04	-874.40	0.00	LT	F
35.0000 05/23/2013			510.64	1318.26	-807.62	0.00	LT	F
20.0000 06/05/2013			291.79	750.21	-458.42	0.00	LT	F
10.0000 06/20/2013			145.90	367.60	-221.70	0.00	LT	F
37.0000 08/16/2013			539.82	1263.18	-723.36	0.00	LT	F
5.0000 01/27/2014			72.95	182.84	-109.89	0.00	LT	F
35.0000 10/05/2015			510.64	630.51	-119.87	0.00	ST	C
30.0000 GARMIN INC. - H2906T109 - MINOR = 50								
SOLD 10/05/2015			1089.83					
ACQ 30.0000 01/27/2014			1089.83	1367.00	-277.17	0.00	LT	F
TOTALS			58241.35	60559.02				

SUMMARY OF CAPITAL GAINS/LOSSES

FEDERAL	SHORT TERM	LONG TERM 28%	LONG TERM	ST WASH SALE	LT WASH SALE	1250 GAIN
NONCOVERED FROM ABOVE	0.00	0.00	0.00	0.00	0.00	0.00*
COVERED FROM ABOVE	-1153.35	0.00	-1164.32	0.00	0.00	
COMMON TRUST FUND	0.00	0.00	0.00			0.00
CAPITAL GAIN DIV/DIST	0.00	0.00	2425.94			0.00
	-1153.35	0.00	1261.62	0.00	0.00	0.00
	=====	=====	=====	=====	=====	=====

STATE

NONCOVERED FROM ABOVE	0.00	0.00	0.00	0.00	0.00	0.00*
COVERED FROM ABOVE	-1153.35	0.00	-1164.32	0.00	0.00	0.00
COMMON TRUST FUND	0.00	0.00	0.00			0.00
CAPITAL GAIN DIV/DIST	0.00	0.00	2425.94			0.00
	-1153.35	0.00	1261.62	0.00	0.00	0.00
	=====	=====	=====	=====	=====	=====

\* - 1250 GAIN DETAILED ON TRANS PAGES, NOT ABOVE