



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



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 instructions is at www.irs.gov/form990pf.

OMB No 1545-0052

2015

Open to Public Inspection

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

Name of foundation SAMUELS FAMILY FOUNDATION INC		A Employer identification number 27-1602205	
Number and street (or P O box number if mail is not delivered to street address) 5012 NW 24TH CIRCLE		B Telephone number (see instructions) (561) 909-2100	
City or town, state or province, country, and ZIP or foreign postal code BOCA RATON, FL 33431		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Final return ☐ Address change		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 ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation			
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ☒ \$ 3,728,594	J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)		

Part I Analysis of Revenue and Expenses <i>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))</i>		Revenue and expenses per books (a)	Net investment income (b)	Adjusted net income (c)	Disbursements for charitable purposes (d) (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	783,550			
	2 Check ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	18,583	18,583		
	4 Dividends and interest from securities	31,255	31,255		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10 _____	98,245			
	b Gross sales price for all assets on line 6a _____ 123,245				
	7 Capital gain net income (from Part IV, line 2)		98,245		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances _____				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	931,633	148,083		
	13 Compensation of officers, directors, trustees, etc	0	0		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule).				
	b Accounting fees (attach schedule).	7,274	7,274		0
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	4,199	207		0
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings.				
	22 Printing and publications				
	23 Other expenses (attach schedule).	139	61		0
	24 Total operating and administrative expenses. Add lines 13 through 23	11,612	7,542		0
	25 Contributions, gifts, grants paid	179,410			179,410
	26 Total expenses and disbursements. Add lines 24 and 25	191,022	7,542		179,410
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	740,611			
	b Net investment income (if negative, enter -0-)		140,541		
	c Adjusted net income (if negative, enter -0-)				

Part II		Balance Sheets	Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing		296,372	919,323	919,323
	2	Savings and temporary cash investments		199,800	524,725	524,725
	3	Accounts receivable ▶ _____				
		Less allowance for doubtful accounts ▶ _____				
	4	Pledges receivable ▶ _____				
		Less allowance for doubtful accounts ▶ _____				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions).				
	7	Other notes and loans receivable (attach schedule) ▶ _____				
		Less allowance for doubtful accounts ▶ _____				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments—U S and state government obligations (attach schedule)		149,076	147,581	147,857
	b	Investments—corporate stock (attach schedule)				
	c	Investments—corporate bonds (attach schedule)		142,281	342,950	335,693
	11	Investments—land, buildings, and equipment basis ▶ _____				
	Less accumulated depreciation (attach schedule) ▶ _____					
12	Investments—mortgage loans.					
13	Investments—other (attach schedule)		1,638,698	2,013,329	1,800,996	
14	Land, buildings, and equipment basis ▶ _____					
	Less accumulated depreciation (attach schedule) ▶ _____					
15	Other assets (describe ▶ _____)		783,550	0	0	
16	Total assets(to be completed by all filers—see the instructions Also, see page 1, item I)		3,209,777	3,947,908	3,728,594	
Liabilities	17	Accounts payable and accrued expenses				
	18	Grants payable				
	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable (attach schedule).				
	22	Other liabilities (describe ▶ _____)				
	23	Total liabilities(add lines 17 through 22)		0	0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☒ and complete lines 24 through 26 and lines 30 and 31.					
	24	Unrestricted		3,209,777	3,947,908	
	25	Temporarily restricted				
	26	Permanently restricted				
	Foundations that do not follow SFAS 117, check here ▶ ☐ and complete lines 27 through 31.					
	27	Capital stock, trust principal, or current funds				
	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(see instructions)		3,209,777	3,947,908	
	31	Total liabilities and net assets/fund balances(see instructions)		3,209,777	3,947,908	

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	3,209,777
2	Enter amount from Part I, line 27a	2	740,611
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	3,950,388
5	Decreases not included in line 2 (itemize) ▶ _____	5	2,480
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	3,947,908

Part IV

Capital Gains and Losses for Tax on Investment Income

List and describe the kind(s) of property sold (e g , real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co)		How acquired P—Purchase (b) D—Donation	Date acquired (c) (mo , day, yr)	Date sold (d) (mo , day, yr)
1 a	25000 SHS HSBC BK USA CD	P	2011-11-02	2015-11-16
b	CAPITAL GAINS DIVIDENDS	P		
c				
d				
e				

(e) Gross sales price	Depreciation allowed (f) (or allowable)	Cost or other basis (g) plus expense of sale	Gain or (loss) (h) (e) plus (f) minus (g)
a 25,000		25,000	0
b 98,245			98,245
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			Gains (Col (h) gain minus col (k), but not less than -0-) or (l) Losses (from col (h))
(i) F M V as of 12/31/69	Adjusted basis (j) as of 12/31/69	Excess of col (i) (k) over col (j), if any	
a			0
b			98,245
c			
d			
e			

2	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	98,245
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8 }		3	

Part V

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

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)
If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No
If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2014	89,236	2,405,437	0 037098
2013	82,410	1,689,639	0 048774
2012	84,512	1,329,237	0 063579
2011	60,903	612,526	0 099429
2010	0	8,213	0 000000

2	Total of line 1, column (d).	2	0 248880
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0 049776
4	Enter the net value of noncharitable-use assets for 2015 from Part X, line 5.	4	3,161,888
5	Multiply line 4 by line 3.	5	157,386
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	1,405
7	Add lines 5 and 6.	7	158,791
8	Enter qualifying distributions from Part XII, line 4.	8	179,410

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

Part VI

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

1a

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

and enter "N/A" on line 1

Date of ruling or determination letter _____

(attach copy of letter if necessary—see instructions)

b

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

c

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

2

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

3

Add lines 1 and 2.

4

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

5

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

6

Credits/Payments

a

2015 estimated tax payments and 2014 overpayment credited to 2015

6a

2,448

b

Exempt foreign organizations—tax withheld at source

6b

c

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

6c

d

Backup withholding erroneously withheld

6d

7

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

8

Enter any **penalty** for underpayment of estimated tax. Check here ☒ if Form 2220 is attached

9

Tax due. If the total of lines 5 and 8 is more than line 7, enter **amount owed**

10

Overpayment. If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid**.

11

Enter the amount of line 10 to be **Credited to 2015 estimated tax** 1,030 **Refunded**

1	1,405
2	0
3	1,405
4	0
5	1,405
6a	2,448
6b	
6c	
6d	
7	2,448
8	13
9	
10	1,030
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

No

b

Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)?

1b

No

If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.

c

Did the foundation file **Form 1120-POL** for this year?

1c

No

d

Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year

(1) On the foundation \$ _____ 0 (2) On foundation managers \$ _____ 0

e

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

2

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

2

No

If "Yes," attach a detailed description of the activities.

3

Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes

3

No

4a

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

4a

No

b

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

4b

5

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

5

No

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

6

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

• By language in the governing instrument, or

• By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?

6

Yes

7

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

7

Yes

8a

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

FL

8b

Yes

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 .

9

No

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

No

10

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

10

Yes

Form 990-PF (2015)

Part VII-A

Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶N/A	13	Yes	
14	The books are in care of ▶MBAF LLC Telephone no ▶(561) 909-2100 Located at ▶225 NE MIZNER BLVD 685 BOCA RATON FL ZIP+4 ▶33432			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here ▶ ☐ and enter the amount of tax-exempt interest received or accrued during the year ▶	15		
16	At any time during calendar year 2015, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes", enter the name of the foreign country ▶	16	Yes	No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? ☐ Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐	1b		
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2015? ☐	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015? ☐ Yes ☒ No If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions). ☐	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2015 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period?(<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015.</i>) ☐	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2015?	4b		No

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

5b

6b

7b

7b

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

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

Total number of other employees paid over \$50,000.	0
--	---

Part VIII

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

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

Total number of others receiving over \$50,000 for professional services.	0
--	---

Part IX-A Summary of Direct Charitable Activities

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

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

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

[illegible]

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	2,536,765
b	Average of monthly cash balances.	1b	673,274
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	3,210,039
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	3,210,039
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	48,151
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	3,161,888
6	Minimum investment return. Enter 5% of line 5.	6	158,094

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	158,094
2a	Tax on investment income for 2015 from Part VI, line 5.	2a	1,405
b	Income tax for 2015 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	1,405
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	156,689
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	156,689
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	156,689

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	179,410
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	179,410
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions).	5	1,405
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	178,005

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				156,689
2 Undistributed income, if any, as of the end of 2015				
a Enter amount for 2014 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2015				
a From 2010.				
b From 2011.				28,645
c From 2012.				18,376
d From 2013.				
e From 2014.				
f Total of lines 3a through e.	47,021			
4 Qualifying distributions for 2015 from Part XII, line 4				
a Applied to 2014, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2015 distributable amount.				156,689
e Remaining amount distributed out of corpus	22,721			
5 Excess distributions carryover applied to 2015 (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	69,742			
b Prior years' undistributed income Subtract line 4b from line 2b.		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions.		0		
e Undistributed income for 2014 Subtract line 4a from line 2a Taxable amount—see instructions.			0	
f Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015.				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2010 not applied on line 5 or line 7 (see instructions).	0			
9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a.	69,742			
10 Analysis of line 9				
a Excess from 2011.				28,645
b Excess from 2012.				18,376
c Excess from 2013.				
d Excess from 2014.				
e Excess from 2015.				22,721

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

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

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

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

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

1 Information Regarding Foundation Managers:

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

VELIA SAMUELS-SWEET

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

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

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

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

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

c Any submission deadlines

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

Part XV

Supplementary Information(continued)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	179,410
b Approved for future payment				
Total			3b	0

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2015)

4. Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

(1) Cash.

(2) Other assets.

(1) Sales of assets to a noncharitable exempt organization.

(2) Purchases of assets from a noncharitable exempt organization.

(3) Rental of facilities, equipment, or other assets.

(4) Reimbursement arrangements.

(5) Loans or loan guarantees.

(6) Performance of services or membership or fundraising solicitations.

d If the answer to any of the above is "Yes," complete the following schedule. Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received.

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

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

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

***** 2016-05-24 *****

Signature of officer or trustee Date Title

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

Form **990-PF** (2015)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
ALZHEIMER'S ASSOCIATION PO BOX 96011 WASHINGTON,DC 200906011	NONE	CHARITABLE	TO SUPPORT EXEMPT ACTIVITIES	2,000
AMERICAN DIABETES ASSOCIATION 1701 NORTH BEAUREGARD ST ALEXANDRIA,VA 22311	NONE	CHARITABLE	TO SUPPORT EXEMPT ACTIVITIES	2,000
AMERICAN FRIENDS OF MOGAN DAVID ADOM 3300 PGA BLVD SUITE 510 PALM BEACH GARDENS,FL 33410	NONE	CHARITABLE	TO SUPPORT EXEMPT ACTIVITIES	5,000
AMERICAN JEWISH JOINT DISTRIBUTION COMMITTEE PO BOX 4124 NEWYORK,NY 10163	NONE	CHARITABLE	TO SUPPORT EXEMPT ACTIVITIES	5,000
AMERICAN PARKINSON DISEASE ASSOCIATION 135 PARKINSON AVE STATEN ISLAND,NY 10305	NONE	CHARITABLE	TO SUPPORT EXEMPT ACTIVITIES	50
APLASTIC ANEMIA AND MDS INTERNATIONAL FOUNDATION 100 PARK AVENUE SUITE 108 ROCKVILLE,MD 20850	NONE	CHARITABLE	TO SUPPORT EXEMPT ACTIVITIES	5,000
BOCA HELPING HANDS 1500 NW 1ST COURT BOCA RATON,FL 33432	NONE	CHARITABLE	TO SUPPORT EXEMPT ACTIVITIES	10,000
BOCA REGIONAL HOSPITAL 745 MEADOWS ROAD BOCA RATON,FL 33486	NONE	CHARITABLE	TO SUPPORT EXEMPT ACTIVITIES	5,000
FENCES FOR FIDO PO BOX 42265 PORTLAND,OR 97242	NONE	CHARITABLE	TO SUPPORT EXEMPT ACTIVITIES	3,000
FORGOTTEN DOG RESCUE 15254 73RD TERRACE NORTH PALM BEACH GARDENS,FL 33418	NONE	CHARITABLE	TO SUPPORT EXEMPT ACTIVITIES	6,000
HADASSAH - THE WOMEN'S ZIONIST ORG OF AMERICA POBOX 1100 NEWYORK,NY 10268	NONE	CHARITABLE	TO SUPPORT EXEMPT ACTIVITIES	11,000
JAFCO 4200 N UNIVERSITY DR SUNRISE,FL 33351	NONE	CHARITABLE	TO SUPPORT EXEMPT ACTIVITIES	10,000
JEWISH ASSOCIATION FOR RESIDENTIAL CARE 21160 95TH AVE SOUTH BOCA RATON,FL 33428	NONE	CHARITABLE	TO SUPPORT EXEMPT ACTIVITIES	10,000
JEWISH FEDERATION OF SOUTH PALM BEACH COUNTY 9901 DONNA KLEIN BOULEVARD BOCA RATON,FL 33428	NONE	CHARITABLE	TO SUPPORT EXEMPT ACTIVITIES	5,825
JEWISH NATIONAL FUND 902 CLIENT MOORE ROAD 128 BOCA RATON,FL 33487	NONE	CHARITABLE	TO SUPPORT EXEMPT ACTIVITIES	10,000
Total				179,410

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
LEUKEMIA AND LYMPHOMA SOCIETY 1311 MAMARONECK AVENUE SUITE 310 WHITE PLAINS,NY 10605	NONE	CHARITABLE	TO SUPPORT EXEMPT ACTIVITIES	10,150
LITERACY COALITION OF PALM BEACH COUNTY 551 SE 8TH STREET SUITE 505 DELRAY BEACH,FL 33483	NONE	CHARITABLE	TO SUPPORT EXEMPT ACTIVITIES	5,000
NATIONAL COUNCIL OF JEWISH WOMEN 475 RIVERSIDE DRIVE SUITE 1901 NEW YORK,NY 10115	NONE	CHARITABLE	TO SUPPORT EXEMPT ACTIVITIES	5,000
NATIONAL PARKINSON FOUNDATION 200 SE 1ST ST STE 800 MIAMI,FL 33131	NONE	CHARITABLE	TO SUPPORT EXEMPT ACTIVITIES	2,000
PLANNED PARENTHOOD OF SOUTH FLORIDA AND THE TREASURE COAST 2300 NORTH MANGO ROAD WEST PALM BEACH,FL 33409	NONE	CHARITABLE	TO SUPPORT EXEMPT ACTIVITIES	5,000
RUTH RALES JEWISH FAMILY SERVICES 21300 RUTH BARON COLEMAN BLVD BOCA RATON,FL 33428	NONE	CHARITABLE	TO SUPPORT EXEMPT ACTIVITIES	20,000
TEMPLE BETH EL OF BOCA RATON 333 SOUTHWEST 4TH AVENUE BOCA RATON,FL 33432	NONE	CHARITABLE	TO SUPPORT EXEMPT ACTIVITIES	15,285
WAYNE BARTON STUDY CENTER 269 NE 14TH ST BOCA RATON,FL 33432	NONE	CHARITABLE	TO SUPPORT AFTER SCHOOL ACTIVITIES	5,000
WINGS OF RESCUE 5959 TOPANGA CANYON BLVD WOODLAND HILLS,CA 91367	NONE	CHARITABLE	TO SUPPORT EXEMPT ACTIVITIES	2,000
WLRN PUBLIC RADIO AND TELEVISION 172 NE 15TH STREET MIAMI,FL 33132	NONE	CHARITABLE	TO SUPPORT EXEMPT ACTIVITIES	3,000
WOMEN IN THE VISUAL ARTS 2960 NW 2ND AVENUE 6 BOCA RATON,FL 334880668	NONE	CHARITABLE	TO SUPPORT EXEMPT ACTIVITIES	5,000
WORLD JEWISH CONGRESS 501 MADISON AVE 9TH FLOOR NEW YORK,NY 10022	NONE	CHARITABLE	TO SUPPPORT EXEMPT ACTIVITIES	10,000
WPBT2 PO BOX 610002 MIAMI,FL 33261	NONE	CHARITABLE	TO SUPPORT EXEMPT ACTIVITIES	2,100
Total				179,410

TY 2015 Accounting Fees Schedule

Name: SAMUELS FAMILY FOUNDATION INC

EIN: 27-1602205

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX PREPARATION	7,274	7,274		0

TY 2015 Investments Corporate Bonds Schedule**Name:** SAMUELS FAMILY FOUNDATION INC**EIN:** 27-1602205

Name of Bond	End of Year Book Value	End of Year Fair Market Value
BANK OF MONTREAL \$25000	25,169	25,027
DOW CHEMICAL CO. \$20000	20,000	19,766
EXXON MOBILE CORPORATION \$50000	50,147	49,920
FPL GROUP CAPT INC. 7.3% \$40000	44,942	38,228
GENERAL ELEC CAP CORP 4.875% \$2000	50,180	51,360
GENERAL ELECTRIC CAPITAL CORPORATION 0.613% COUPON RATE	49,957	49,511
IBM CORP 50000 SHS	50,192	49,841
MERCK & CO INC. \$27000	27,103	27,020
ORACLE CORP \$25000	25,260	25,020

TY 2015 Investments Government Obligations Schedule

Name: SAMUELS FAMILY FOUNDATION INC

EIN: 27-1602205

**US Government Securities - End of
Year Book Value:**

0

**US Government Securities - End of
Year Fair Market Value:**

0

**State & Local Government
Securities - End of Year Book
Value:**

147,581

**State & Local Government
Securities - End of Year Fair
Market Value:**

147,857

TY 2015 Investments - Other Schedule**Name:** SAMUELS FAMILY FOUNDATION INC**EIN:** 27-1602205

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
AMER CENT DIVERSIFIED BD C	AT COST	63,359	59,782
AMER CENT HERITAGE A	AT COST	64,080	53,424
AMERICAN GR FD OF AMERICA A	AT COST	88,681	80,964
AMERICAN GR FD OF AMERICA C	AT COST	75,000	69,005
BLACKROCK EQUITY DIVIDEND C	AT COST	145,486	129,807
BLACKROCK GLB LONG/SHORT EQ C	AT COST	151,970	148,444
BLACKROCK GLOBAL ALLOCATION A	AT COST	134,853	110,446
DAVIS NEW YORK VENTURE A	AT COST	149,522	116,713
DIAMOND HILL LARGE CAP A	AT COST	53,315	60,660
EAGLE SMALL CAP GROWTH A	AT COST	84,841	79,989
FIRST EAGLE GLOBAL A	AT COST	80,434	80,475
FIRST EAGLE GOLD A	AT COST	80,249	32,984
GOLDMAN SACHS INCOME BUILDER A	AT COST	119,142	111,248
JOHN HANCOCK GLB ABS RET STR A	AT COST	37,988	33,474
JP MORGAN LARGE CAP GRW A	AT COST	27,403	38,843
JP MORGAN LARGE CAP GRW C	AT COST	50,000	55,596
JP MORGAN STRAT INC OPPORT C	AT COST	89,393	83,845
NEUBERGER BERMAN EMMK EQ A	AT COST	105,000	86,676
PRINCIPAL PREFERRED SEC A	AT COST	159,895	158,511
RIDGEWORTH HIGH INCOME A	AT COST	123,463	103,154
THORNBURG INTL VALUE A	AT COST	129,255	106,956

TY 2015 Other Assets Schedule

Name: SAMUELS FAMILY FOUNDATION INC

EIN: 27-1602205

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
VELIA SWEET CLAT #1	397,300		
VELIA SWEET CLAT #2	386,250		

TY 2015 Other Decreases Schedule**Name:** SAMUELS FAMILY FOUNDATION INC**EIN:** 27-1602205

Description	Amount
BOOK/TAX DIFFERENCE ON FORM 1099 REPORTING	989
NON DEDUCTIBLE TAX EXEMPT BOND PREMIUM	1,491

TY 2015 Other Expenses Schedule**Name:** SAMUELS FAMILY FOUNDATION INC**EIN:** 27-1602205

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ANNUAL REPORT	61	61		0
LATE FILING PENALTY	78	0		0

TY 2015 Substantial Contributors Schedule

Name: SAMUELS FAMILY FOUNDATION INC

EIN: 27-1602205

Name	Address
THE VELIA SAMUELS-SWEET CHARITABLE LEAD ANNUITY TRUST NO 1 DATED 972010	4740 S OCEAN BLVD 905 HIGHLAND BEACH, FL 33487
THE VELIA SAMUELS-SWEET CHARITABLE LEAD ANNUITY TRUST NO 2 DATED 972010	4740 S OCEAN BLVD 905 HIGHLAND BEACH, FL 33487

TY 2015 Taxes Schedule**Name:** SAMUELS FAMILY FOUNDATION INC**EIN:** 27-1602205

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAX PAID	207	207		0
FORM 990-PF - EXCISE TAX	3,992	0		0

Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service	Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 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 SAMUELS FAMILY FOUNDATION INC	Employer identification number 27-1602205
--	---

Organization type (check one)

Filers of: Form 990 or 990-EZ Form 990-PF	Section: ☐ 501(c)() (enter number) organization ☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation ☐ 527 political organization ☒ 501(c)(3) exempt private foundation ☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation ☐ 501(c)(3) taxable private foundation
--	---

Check if your organization is covered by the **General Rule** or a **Special Rule**.
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions

General Rule

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or other property) from any one contributor Complete Parts I and II See instructions for determining a contributor's total contributions

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** \$5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and II
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals Complete Parts I, II, and III
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc , purposes, but no such contributions totaled more than \$1,000 If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc , purpose Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc , contributions totaling \$5,000 or more during the year ▶ \$ _____

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer “No” on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

Name of organization SAMUELS FAMILY FOUNDATION INC	Employer identification number 27-1602205
--	---

Part I Contributors (see instructions) Use duplicate copies of Part I if additional space is needed			
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	THE VELIA SAMUELS-SWEET CLAT NO 1 D	\$ 397,300	Person ☒
	4740 S OCEAN BLVD 905		Payroll ☐
	HIGHLAND BEACH, FL33487		Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
2	THE VELIA SAMUELS-SWEET CLAT NO 2 D	\$ 386,250	Person ☒
	4740 S OCEAN BLVD 905		Payroll ☐
	HIGHLAND BEACH, FL33487		Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)

Employer identification number
27-1602205

Part II **Noncash Property**
(see instructions) Use duplicate copies of Part II if additional space is needed

[illegible]

Name of organization SAMUELS FAMILY FOUNDATION INC	Employer identification number 27-1602205
--	---

Part III

Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ▶ \$ _____

Use duplicate copies of Part III if additional 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, and 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, and 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, and 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, and ZIP 4	Relationship of transferor to transferee	
	--		