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.*

OMB No 1545-0052

2015

Open to Public Inspection

For calendar year 2015 or tax year beginning , and ending

Name of foundation
THE KUTYA MAJOR FOUNDATION

Number and street (or P O box number if mail is not delivered to street address) | Room/suite
P O BOX 1501, NJ2-130-03-31

City or town | State | ZIP code
PENNINGTON | NJ | 08534-1501

Foreign country name | Foreign province/state/county | Foreign postal code

A Employer identification number
27-3978348

B Telephone number (see instructions)
609-274-6834

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 change

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)* ▶ $ 2,753,485

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

Part I **Analysis of Revenue and Expenses** *(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))*

			(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc , received (attach schedule)				
	2	Check ▶ ☒ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments				
	4	Dividends and interest from securities	41,298	41,298		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	-105,903			
	b	Gross sales price for all assets on line 6a 1,855,383				
	7	Capital gain net income (from Part IV, line 2)				
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)				
	12	**Total.** Add lines 1 through 11	-64,605	41,298	0	
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc				
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)	200			200
	b	Accounting fees (attach schedule)	580			580
	c	Other professional fees (attach schedule)	30,091	18,055		12,036
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	41,867	173		
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)	30			30
	24	**Total operating and administrative expenses.** Add lines 13 through 23	72,768	18,228	0	12,846
	25	Contributions, gifts, grants paid	55,000			55,000
	26	**Total expenses and disbursements.** Add lines 24 and 25	127,768	18,228	0	67,846
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	-192,373			
	b	**Net investment income** (if negative, enter -0-)		23,070		
	c	**Adjusted net income** (if negative, enter -0-)			0	

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Form **990-PF** (2015)

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Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)

		Description	Beginning of year (a) Book Value	End of year (b) Book Value	End of year (c) Fair Market Value
Assets	1	Cash—non-interest-bearing	6	1	1
	2	Savings and temporary cash investments	282,509	125,181	125,181
	3	Accounts receivable ▶			
		Less allowance for doubtful accounts ▶			
	4	Pledges receivable ▶			
		Less allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶			
		Less allowance for doubtful accounts ▶			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S. and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	1,911,384	1,970,714	2,047,140
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment: basis ▶			
		Less accumulated depreciation (attach schedule) ▶			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	786,652	692,677	581,163
	14	Land, buildings, and equipment: basis ▶			
		Less accumulated depreciation (attach schedule) ▶			
	15	Other assets (describe ▶)			
	16	**Total assets** (to be completed by all filers—see the instructions Also, see page 1, item I)	2,980,551	2,788,573	2,753,485
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			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds	2,980,551	2,788,573	
	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)	2,980,551	2,788,573	
	31	**Total liabilities and net assets/fund balances** (see instructions)	2,980,551	2,788,573	

Part III Analysis of Changes in Net Assets or Fund Balances

	Description	Line	Amount
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	2,980,551
2	Enter amount from Part I, line 27a	2	-192,373
3	Other increases not included in line 2 (itemize) ▶ COST BASIS ADJUSTMENT	3	395
4	Add lines 1, 2, and 3	4	2,788,573
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	2,788,573

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 Statement			
b				
c				
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				
b				
c				
d				
e				

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

	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a				
b				
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	-105,903
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	0

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	60,355	1,054,327	0 057245
2013	58,750	231,522	0 253756
2012	55,276	148,385	0 372517
2011	81,719	51,260	1 594206
2010			0 000000

2	**Total** of line 1, column (d)	2	2 277724
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 569431
4	Enter the net value of noncharitable-use assets for 2015 from Part X, line 5	4	2,245,203
5	Multiply line 4 by line 3	5	1,278,488
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	231
7	Add lines 5 and 6	7	1,278,719
8	Enter qualifying distributions from Part XII, line 4	8	67,846

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	1	461
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-)	2	0
3	Add lines 1 and 2	3	461
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	
5	**Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter -0-	5	461
6	Credits/Payments		
a	2015 estimated tax payments and 2014 overpayment credited to 2015 — 6a: 189		
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	7	189
8	Enter any **penalty** for underpayment of estimated tax Check here ☐ if Form 2220 is attached	8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	272
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	0
11	Enter the amount of line 10 to be: **Credited to 2016 estimated tax** ▶ — **Refunded** ▶	11	0

Part VII-A Statements Regarding Activities

			Yes	No
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)?	1b		X
	*If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year **(1)** On the foundation ▶ $ ______ **(2)** On foundation managers ▶ $ ______			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ ______			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities*	2		X
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?	4b	N/A	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T*	5		X
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	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) ▶ FL			
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)*

			Yes	No
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		X
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		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	
	Website address ▶ N/A			
14	The books are in care of ▶ UST-MLT, A DIVISION OF BANK OF AMERICA, N Telephone no ▶ 609-274-6834 Located at ▶ 1300 MERRILL LYNCH DRIVE PENNINGTON NJ ZIP+4 ▶ 08534-1501			
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?	16		X
	See the instructions for exceptions and filing requirements for FinCEN Form 114 If "Yes," enter the name of the foreign country ▶			

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

			Yes	No
	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 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)?	1b	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?	1c		X
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	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 ▶ 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? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015)*	3b	N/A	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2015?	4b		X

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

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)? **5b** N/A

Organizations relying on a current notice regarding disaster assistance check here ▶ ☐

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? N/A ☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53 4945–5(d).

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b** No: X

If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? **7b** N/A

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
FLORA MAJOR 35 WATERGATE DR - SUITE 903 SARASOTA, FL 34:	TRUSTEE 1 00	0		

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

(a) Name and address of each employee paid more than $50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Total number of other employees paid over $50,000 ▶ 0

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

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 ▶		

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 NONE	
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 NONE	
2	
All other program-related investments See instructions	
3 NONE	
Total. Add lines 1 through 3 ▶	0

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	2,095,980
b	Average of monthly cash balances	1b	183,414
c	Fair market value of all other assets (see instructions)	1c	
d	**Total** (add lines 1a, b, and c)	1d	2,279,394
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) | 1e |		
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	2,279,394
4	Cash deemed held for charitable activities Enter 1 ½ % of line 3 (for greater amount, see instructions)	4	34,191
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	2,245,203
6	**Minimum investment return.** Enter 5% of line 5	6	112,260

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	112,260
2a	Tax on investment income for 2015 from Part VI, line 5	2a	461		
b	Income tax for 2015 (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	461
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	111,799
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	111,799
6	Deduction from distributable amount (see instructions)			6	
7	**Distributable amount** as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1			7	111,799

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	67,846
b	Program-related investments—total from Part IX-B	1b	
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	67,846
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	
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	67,846

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					111,799
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____					
3	Excess distributions carryover, if any, to 2015					
a	From 2010					
b	From 2011	79,156				
c	From 2012	47,857				
d	From 2013	47,174				
e	From 2014	48,222				
f	**Total** of lines 3a through e		222,409			
4	Qualifying distributions for 2015 from Part XII, line 4. ▶ $ 67,846					
a	Applied to 2014, but not more than line 2a					
b	Applied to undistributed income of prior years (Election required—see instructions)					
c	Treated as distributions out of corpus (Election required—see instructions)					
d	Applied to 2015 distributable amount					67,846
e	Remaining amount distributed out of corpus					
5	Excess distributions carryover applied to 2015 *(If an amount appears in column (d), the same amount must be shown in column (a).)*		43,953			43,953
6	**Enter the net total of each column as indicated below:**					
a	Corpus Add lines 3f, 4c, and 4e Subtract line 5		178,456			
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					
d	Subtract line 6c from line 6b Taxable amount—see instructions					
e	Undistributed income for 2014 Subtract line 4a from line 2a. Taxable amount—see instructions				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)					
8	Excess distributions carryover from 2010 not applied on line 5 or line 7 (see instructions)					
9	**Excess distributions carryover to 2016.** Subtract lines 7 and 8 from line 6a		178,456			
10	Analysis of line 9.					
a	Excess from 2011	35,203				
b	Excess from 2012	47,857				
c	Excess from 2013	47,174				
d	Excess from 2014	48,222				
e	Excess from 2015					

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

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 foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			(e) Total
	(a) 2015	(b) 2014	(c) 2013	(d) 2012	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					0
b 85% of line 2a					0
c Qualifying distributions from Part XII, line 4 for each year listed					0
d Amounts included in line 2c not used directly for active conduct of exempt activities					0
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					0
3 Complete 3a, b, or c for the alternative test relied upon. a "Assets" alternative test—enter: (1) Value of all assets					0
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					0
b "Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					0
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)					0
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					0
(3) Largest amount of support from an exempt organization					0
(4) Gross investment income					0

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

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))

FLORA MAJOR

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

NONE

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 e-mail 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 Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
See Attached Statement				
Total			▶ 3a	55,000
b *Approved for future payment*				
NONE				
Total			▶ 3b	0

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 (See instructions)
		(a) Business code	(b) Amount	(c) Exclusion 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	41,298	
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	-105,903	
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		-64,605	0

13 Total. Add line 12, columns (b), (d), and (e) . . . . . 13 -64,605

(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) (See instructions)
	Not Applicable

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

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

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.

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements
		Not Applicable	

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

b If "Yes," complete the following schedule

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

Sign Here

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

▶ [signature] 5/2/16 ▶ Trustee

Signature of officer or trustee — Date — Title

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

Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Date	Check ☒ if self-employed	PTIN
	LAWRENCE F MCGUIRE	[signature]	4/28/2016		P00364310
	Firm's name ▶ PricewaterhouseCoopers, LLP			Firm's EIN ▶	13-4008324
	Firm's address ▶ 600 Grant Street, Pittsburgh, PA 15219			Phone no	412-355-6000

Continuation of Part XV, Line 3a (990-PF) - Grants and Contributions Paid During the Year

Recipient(s) paid during the year

Name SARASOTA MEMORIAL HEALTHCARE FOUNDATION				
Street 1515 SOUTH OSPREY AVENUE #B-4				
City SARASOTA	**State** FL	**Zip Code** 34239	**Foreign Country**	
Relationship NONE	**Foundation Status** PC			
Purpose of grant/contribution GENERAL OPREATING				**Amount** 50,000
Name ISOTHERMAL COMMUNITY COLLEGE FOUNDATION				
Street PO BOX 804				
City SPINDALE	**State** NC	**Zip Code** 28160	**Foreign Country**	
Relationship NONE	**Foundation Status** PC			
Purpose of grant/contribution GENERAL OPERATING				**Amount** 5,000
Name				
Street				
City	**State**	**Zip Code**	**Foreign Country**	
Relationship	**Foundation Status**			
Purpose of grant/contribution				**Amount**
Name				
Street				
City	**State**	**Zip Code**	**Foreign Country**	
Relationship	**Foundation Status**			
Purpose of grant/contribution				**Amount**
Name				
Street				
City	**State**	**Zip Code**	**Foreign Country**	
Relationship	**Foundation Status**			
Purpose of grant/contribution				**Amount**
Name				
Street				
City	**State**	**Zip Code**	**Foreign Country**	
Relationship	**Foundation Status**			
Purpose of grant/contribution				**Amount**

Part I, Line 6 (990-PF) - Gain/Loss from Sale of Assets Other Than Inventory

	Amount	Totals	Gross Sales	Cost or Other Basis, Expenses, Depreciation and Adjustments	Net Gain or Loss
Long Term CG Distributions	723	Capital Gains/Losses	1,855,383	1,961,286	-105,903
Short Term CG Distributions	0	Other sales	0	0	0

	Description	CUSIP #	Check "X" to include in Part IV	Purchaser	Check "X" if Purchaser is a Business	Acquisition Method	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Valuation Method	Expense of Sale and Cost of Improvements	Depreciation	Adjustments	Net Gain or Loss
1	ABBVIE INC SHS	00287Y109	X				12/19/2014	8/26/2015	5,334	5,869				0	-535
2	ABBVIE INC SHS	00287Y109	X				12/19/2014	8/26/2015	3,598	3,958				360	0
3	ALIBABA GROUP HOLDING L	01609W102	X				12/26/2014	7/7/2015	696	960				0	-264
4	ALIBABA GROUP HOLDING L	01609W102	X				1/14/2015	7/7/2015	16,555	21,221				0	-4,666
5	ALIBABA GROUP HOLDING L	01609W102	X				4/14/2015	7/7/2015	6,730	7,358				0	-628
6	ALIBABA GROUP HOLDING L	01609W102	X				2/13/2015	7/7/2015	2,011	2,292				0	-281
7	ALIBABA GROUP HOLDING L	01609W102	X				12/19/2014	7/7/2015	11,681	16,410				0	-4,729
8	ALIBABA GROUP HOLDING L	01609W102	X				12/22/2014	7/7/2015	15,858	22,447				0	-6,589
9	AMAZON COM INC COM	023135106	X				12/19/2014	8/26/2015	58,327	35,837				0	22,490
10	AMAZON COM INC COM	023135106	X				12/23/2014	8/26/2015	482	306				0	176
11	BOEING COMPANY	097023105	X				12/26/2014	8/26/2015	4,338	4,470				0	-132
12	CELGENE CORP COM	151020104	X				12/19/2014	8/26/2015	9,045	9,115				0	-70
13	CONOCOPHILLIPS	20825C104	X				11/19/2015	12/21/2015	62,783	75,453				0	-12,670
14	DISNEY (WALT) CO COM STK	254687106	X				12/19/2014	8/26/2015	5,963	5,622				0	341
15	EASTMAN CHEMICAL CO CC	277432100	X				12/19/2014	8/26/2015	2,249	2,481				0	-232
16	EASTMAN CHEMICAL CO CC	277432100	X				12/22/2014	12/21/2015	26,499	29,903				0	-3,404
17	EASTMAN CHEMICAL CO CC	277432100	X				2/13/2015	12/21/2015	11,347	12,818				0	-1,471
18	EASTMAN CHEMICAL CO CC	277432100	X				4/14/2015	12/21/2015	31,371	34,435				0	-3,064
19	EASTMAN CHEMICAL CO CC	277432100	X				12/19/2014	12/21/2015	17,354	19,547				0	-2,193
20	F5 NETWORKS INC COM	315616102	X				1/22/2015	8/26/2015	1,427	1,350				0	77
21	F5 NETWORKS INC COM	315616102	X				1/22/2015	11/19/2015	41,156	44,565				0	-3,409
22	F5 NETWORKS INC COM	315616102	X				9/9/2015	11/19/2015	208	245				0	-37
23	FIDELITY ADV SMALL CAP	315805655	X				3/3/2015	8/26/2015	4,770	5,030				0	-260
24	FIDELITY ADV SMALL CAP	315805655	X				3/3/2015	8/26/2015	28	30				2	0
25	FIDELITY ADV SMALL CAP	315805655	X				3/3/2015	8/26/2015	1	1				0	0
26	FIDELITY ADV SMALL CAP	315805655	X				9/9/2015	10/2/2015	12	13				0	-1
27	FIDELITY ADV SMALL CAP	315805655	X				3/3/2015	10/2/2015	9	9				0	0
28	FIDELITY ADV SMALL CAP	315805655	X				3/3/2015	10/2/2015	71,540	76,197				0	-4,657
29	FIDELITY ADV SMALL CAP	315805655	X				3/3/2015	11/16/2015	20	21				0	-1
30	FIDELITY ADV SMALL CAP	315805655	X				3/17/2015	11/16/2015	29	30				0	-1
31	FIDELITY ADV SMALL CAP	315805655	X				3/3/2015	11/16/2015	49,001	50,958				0	-1,957
32	FIREEYE INC	31816Q101	X				1/7/2015	8/26/2015	15,895	13,326				0	2,569
33	FIREEYE INC	31816Q101	X				9/9/2015	12/3/2015	132	231				0	-99
34	FIREEYE INC	31816Q101	X				1/7/2015	12/3/2015	27,991	39,510				0	-11,519
35	GENERAC HLDGS INC	368736104	X				12/19/2014	6/11/2015	37,289	43,969				0	-6,680
36	GENERAC HLDGS INC	368736104	X				12/23/2014	6/11/2015	52,341	60,875				0	-8,534
37	HERSHEY COMPANY	427866108	X				4/14/2015	6/11/2015	6,643	7,393				0	-750
38	HERSHEY COMPANY	427866108	X				12/19/2014	6/11/2015	21,386	24,560				0	-3,174
39	HERSHEY COMPANY	427866108	X				2/13/2015	6/11/2015	1,547	1,803				0	-256
40	HERSHEY COMPANY	427866108	X				12/26/2014	6/11/2015	182	213				0	-31
41	HERSHEY COMPANY	427866108	X				12/24/2014	6/11/2015	28,575	33,417				0	-4,842
42	ISHARES PHLX	464287523	X				4/28/2015	11/24/2015	50,794	53,253				0	-2,459
43	ISHARES PHLX	464287523	X				6/11/2015	11/24/2015	72,242	78,850				0	-6,608
44	ISHARES PHLX	464287523	X				9/9/2015	11/24/2015	5,026	4,759				0	267
45	JP MORGAN ETF TRUST SHS	46641Q209	X				3/24/2015	4/14/2015	104,190	102,905				0	1,285
46	ELI LILLY & CO	532457108	X				12/19/2014	8/26/2015	6,041	5,482				0	559
47	ELI LILLY & CO	532457108	X				12/19/2014	8/26/2015	4,690	4,319				0	371
48	LORD ABBETT GROWTH	543915292	X				12/19/2014	8/26/2015	22	22				0	0
49	LORD ABBETT GROWTH	543915292	X				12/19/2014	8/26/2015	16,987	17,032				45	0
50	LORD ABBETT GROWTH	543915292	X				12/19/2014	8/26/2015	22	22				0	0
51	LORD ABBETT GROWTH	543915292	X				8/21/2015	8/26/2015	19	19				0	0
52	LORD ABBETT GROWTH	543915292	X				12/19/2014	8/26/2015	2	2				0	0
53	LORD ABBETT CALIBRATED	54400M799	X				2/3/2015	11/11/2015	59,895	63,231				0	-3,336
54	LORD ABBETT CALIBRATED	54400M799	X				2/13/2015	11/11/2015	5,363	5,754				0	-391
55	LORD ABBETT CALIBRATED	54400M799	X				2/13/2015	11/11/2015	20	22				0	-2
56	LORD ABBETT CALIBRATED	54400M799	X				4/14/2015	11/11/2015	12,794	13,856				0	-1,062
57	LOCKHEED MARTIN CORP	539830109	X				6/11/2015	8/26/2015	11,000	10,498				0	502
58	LORD ABBETT GROWTH	543915292	X				12/19/2014	8/26/2015	7,149	7,168				19	0
59	LORD ABBETT CALIBRATED	54400M799	X				9/9/2015	11/11/2015	13	14				0	-1
60	LORD ABBETT CALIBRATED	54400M799	X				9/9/2015	11/11/2015	1,965	1,921				0	44
61	MARKET VECTORS RETAIL E	57060U225	X				12/19/2014	6/11/2015	37,868	35,460				0	2,408
62	MARKET VECTORS RETAIL E	57060U225	X				12/24/2014	6/11/2015	51,197	48,559				0	2,638
63	MARKET VECTORS RETAIL E	57060U225	X				12/26/2014	6/11/2015	151	144				0	7
64	MARKET VECTORS RETAIL E	57060U225	X				2/13/2015	6/11/2015	6,059	6,068				0	-9
65	MARKET VECTORS RETAIL E	57060U225	X				4/14/2015	6/11/2015	12,572	12,871				0	-299
66	NOVO NORDISK A S ADR	670100205	X				12/23/2014	8/26/2015	765	610				0	155
67	OCCIDENTAL PETE CORP CA	674599105	X				12/19/2014	7/7/2015	20,346	21,972				0	-1,626
68	OCCIDENTAL PETE CORP CA	674599105	X				12/22/2014	7/7/2015	27,470	29,869				0	-2,399
69	PRUDENTIAL JENNISON	74441P866	X				8/6/2015	11/18/2015	27,396	31,242				0	-3,846
70	PRUDENTIAL JENNISON	74441P866	X				8/21/2015	11/18/2015	37	42				0	-5
71	PRUDENTIAL JENNISON	74441P866	X				8/21/2015	11/18/2015	18,552	19,749				0	-1,197
72	PRUDENTIAL JENNISON	74441P866	X				6/11/2015	11/18/2015	47,674	53,588				0	-5,914

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Part I, Line 6 (990-PF) - Gain/Loss from Sale of Assets Other Than Inventory

	Amount
Long Term CG Distributions	723
Short Term CG Distributions	0

Totals	Gross Sales	Cost or Other Basis, Expenses, Depreciation and Adjustments	Net Gain or Loss
Capital Gains/Losses	1,855,383	1,961,286	-105,903
Other sales	0	0	0

	Description	CUSIP #	Check "X" to include in Part IV	Purchaser	Check "X" if Purchaser is a Business	Acquisition Method	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Valuation Method	Expense of Sale and Cost of Improvements	Depreciation	Adjustments	Net Gain or Loss
73	ST JUDE MEDICAL INC	790849103	X				12/19/2014	8/26/2015	5,932	5,866				0	66
74	SECTOR SPDR FINANCIAL	81369Y605	X				12/26/2014	8/26/2015	182	200				19	1
75	SECTOR SPDR FINANCIAL	81369Y605	X				12/26/2014	8/26/2015	2,587	2,857				0	-270
76	STARBUCKS CORP	855244109	X				12/23/2014	8/26/2015	19,559	15,221				0	4,338
77	STARBUCKS CORP	855244109	X				12/19/2014	8/26/2015	39,326	30,111				0	9,215
78	VERIZON COMMUNICATNS C	92343V104	X				1/26/2015	8/26/2015	178	188				10	0
79	VERIZON COMMUNICATNS C	92343V104	X				1/26/2015	8/26/2015	7,422	7,857				0	-435
80	ALLERGAN PLC	G0177J108	X				12/19/2014	8/26/2015	4,750	4,206				0	544
81	CATERPILLAR INC	149123101	X				12/19/2014	1/26/2015	33,475	35,577					-2,102
82	CATERPILLAR INC	149123101	X				12/26/2014	1/26/2015	42,978	47,123					-4,145
83	CELGENE CORP	151020104	X				12/19/2014	1/14/2015	21,841	21,258					583
84	ELI LILLY & CO	532457108	X				12/19/2014	1/6/2015	25,826	26,666				840	0
85	ELI LILLY & CO	532457108	X				12/19/2014	1/6/2015	628	649				21	0
86	MERCK AND CO INC	58933Y105	X				12/19/2014	1/6/2015	35,046	35,090				44	0
87	MERCK AND CO INC	58933Y105	X				12/19/2014	1/6/2015	7,755	7,765				10	0
88	NOVO NORDISK A S ADR	670100205	X				12/19/2014	1/14/2015	49,663	49,217					446
89	NOVO NORDISK A S ADR	670100205	X				12/23/2014	1/14/2015	30,742	30,304					438
90	SECTOR SPDR CONSMRS	81369Y308	X				12/19/2014	3/24/2015	43,804	43,680					124
91	SECTOR SPDR CONSMRS	81369Y308	X				12/24/2014	3/24/2015	58,715	59,533					-818
92	SECTOR SPDR CONSMRS	81369Y308	X				12/26/2014	3/24/2015	342	346					-4
93	SECTOR SPDR UTILITIES	81369Y886	X				12/19/2014	1/6/2015	44,026	43,651					375
94	SECTOR SPDR UTILITIES	81369Y886	X				12/24/2014	1/6/2015	8,332	8,409					-77
95	SECTOR SPDR UTILITIES	81369Y886	X				12/24/2014	3/3/2015	47,445	51,077					-3,632
96	SECTOR SPDR UTILITIES	81369Y886	X				2/13/2015	3/3/2015	888	917					-29
97	STRATASYS LTD	M85548101	X				12/19/2014	2/3/2015	11,704	16,411					-4,707
98	STRATASYS LTD	M85548101	X				12/24/2014	2/3/2015	15,292	22,099					-6,807
99	STRATASYS LTD	M85548101	X				12/26/2014	2/3/2015	35,498	52,827					-17,329

Part I, Line 16a (990-PF) - Legal Fees

		200	0	0	200
	Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes (Cash Basis Only)
1	LEGAL FEES	200			200

Part I, Line 16b (990-PF) - Accounting Fees

		Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes (Cash Basis Only)
		580	0	0	580
	Description				
1	TAX PREP FEES	580			580

Part I, Line 16c (990-PF) - Other Professional Fees

		Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes (Cash Basis Only)
		30,091	18,055	0	12,036
	Description				
1	US TRUST FEES AS AGENT	30,091	18,055		12,036

Part I, Line 18 (990-PF) - Taxes

	Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
		41,867	173	0	0
1	PY EXCISE TAX DUE	41,505			
2	ESTIMATED EXCISE PAYMENTS	189			
3	FORIEGN TAX WITHHELD	173	173		

Part I, Line 23 (990-PF) - Other Expenses

		30	0	0	30
	Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
1	OTHER MISC FEES	30	0		30

Part II, Line 10b (990-PF) - Investments - Corporate Stock

	Description	Num Shares/ Face Value	Book Value Beg of Year	Book Value End of Year	FMV Beg of Year	FMV End of Year
			1,911,384	1,970,714	0	2,047,140
1						
2	ALLERGAN PLC	0		82,364		98,125
3	LYONDELLBASELL INDUSTRIE	0		48,126		48,143
4	AVAGO TECHNOLOGIES LTD	0		37,094		36,578
5	ABBOTT LABORATORIES	0		48,212		47,560
6	ABBVIE INC SHS	0		98,334		90,459
7	AMAZON COM INC	0		48,716		107,467
8	AMERICAN WTR WKS CO INC	0		50,490		56,464
9	APPLE COMPUTER INC COM	0		72,340		66,419
10	BOEING COMPANY	0		60,847		66,945
11	CELGENE CORP	0		132,563		139,880
12	COLGATE PALMOLIVE CO COM	0		53,549		50,898
13	DISNEY (WALT) COMPANY HOLDING CO	0		45,295		50,754
14	EXXON MOBIL CORP	0		110,052		97,204
15	J P MORGAN CHASE & CO	0		75,258		73,689
16	JOHNSON & JOHNSON COM	0		93,848		92,243
17	LAM RESH CORP COM	0		37,496		37,645
18	ELI LILLY & CO COM	0		42,703		50,050
19	LOCKHEED MARTIN CORP	0		56,479		64,276
20	MERCK AND CO INC SHS	0		66,552		60,585
21	METLIFE INC	0		75,538		71,158
22	NOVO NORDISK A/S ADR	0		37,724		50,355
23	PACKAGING CORP AMER	0		84,379		68,220
24	PHILLIPS 66 SHS	0		62,807		64,377
25	PROCTER & GAMBLE CO COM	0		99,863		90,448
26	QUALCOMM INC	0		60,364		62,181
27	ST JUDE MEDICAL INC	0		46,775		42,992
28	STARBUCKS CORP COM	0		54,892		74,377
29	TRANSDIGM GROUP INC	0		50,320		48,431
30	VERIZON COMMUNICATIONS INC	0		87,838		87,541
31	WAL MART STORES INC	0		49,896		51,676

Part II, Line 13 (990-PF) - Investments - Other

	Asset Description	Basis of Valuation	Book Value Beg of Year	Book Value End of Year	FMV End of Year
			786,652	692,677	581,163
1				0	
2	LORD ABBETT GROWTH		0	190,250	190,724
3	SECTOR SPDR TR		0	102,427	99,276
4	CASH SURRENDER VALUE LIFE INS			400,000	291,163

Part IV (990-PF) - Capital Gains and Losses for Tax on Investment Income

	Amount
Long Term CG Distributions	723
Short Term CG Distributions	0

#	Description of Property Sold	CUSIP #	Acquisition Method	Date Acquired	Date Sold	Gross Sales Price	Depreciation Allowed	Adjustments	Cost or Other Basis Plus Expense of Sale	Gain or Loss	F M V as of 12/31/69	Adjusted Basis as of 12/31/69	Excess of FMV Over Adjusted Basis	Gains Minus Excess FMV Over Adj Basis or Losses
						1,854,660	0	1,370	1,962,656	-106,626	0	0	0	-106,626
1	ABBVIE INC SHS	00287Y109		12/19/2014	8/26/2015	5,334		0	5,869	-535	0	0	0	-535
2	ABBVIE INC SHS	00287Y109		12/19/2014	8/26/2015	3,598		360	3,958	0	0	0	0	0
3	ALIBABA GROUP HOLDING L	01609W102		12/26/2014	7/7/2015	696		0	960	-264	0	0	0	-264
4	ALIBABA GROUP HOLDING L	01609W102		1/14/2015	7/7/2015	16,555		0	21,221	-4,666	0	0	0	-4,666
5	ALIBABA GROUP HOLDING L	01609W102		4/14/2015	7/7/2015	6,730		0	7,358	-628	0	0	0	-628
6	ALIBABA GROUP HOLDING L	01609W102		2/13/2015	7/7/2015	2,011		0	2,292	-281	0	0	0	-281
7	ALIBABA GROUP HOLDING L	01609W102		12/19/2014	7/7/2015	11,681		0	16,410	-4,729	0	0	0	-4,729
8	ALIBABA GROUP HOLDING L	01609W102		12/22/2014	7/7/2015	15,858		0	22,447	-6,589	0	0	0	-6,589
9	AMAZON COM INC COM	023135106		12/19/2014	8/26/2015	58,327		0	35,837	22,490	0	0	0	22,490
10	AMAZON COM INC COM	023135106		12/23/2014	8/26/2015	482		0	306	176	0	0	0	176
11	BOEING COMPANY	097023105		12/26/2014	8/26/2015	4,338		0	4,470	-132	0	0	0	-132
12	CELGENE CORP COM	151020104		12/19/2014	8/26/2015	9,045		0	9,115	-70	0	0	0	-70
13	CONOCOPHILLIPS	20825C104		11/19/2015	12/21/2015	62,783		0	75,453	-12,670	0	0	0	-12,670
14	DISNEY (WALT) CO COM STK	254687106		12/19/2014	8/26/2015	5,963		0	5,622	341	0	0	0	341
15	EASTMAN CHEMICAL CO CO	277432100		12/19/2014	8/26/2015	2,249		0	2,481	-232	0	0	0	-232
16	EASTMAN CHEMICAL CO CO	277432100		12/22/2014	12/21/2015	26,499		0	29,903	-3,404	0	0	0	-3,404
17	EASTMAN CHEMICAL CO CO	277432100		2/13/2015	12/21/2015	11,347		0	12,818	-1,471	0	0	0	-1,471
18	EASTMAN CHEMICAL CO CO	277432100		4/14/2015	12/21/2015	31,371		0	34,435	-3,064	0	0	0	-3,064
19	EASTMAN CHEMICAL CO CO	277432100		12/19/2014	12/21/2015	17,354		0	19,547	-2,193	0	0	0	-2,193
20	F5 NETWORKS INC COM	315616102		1/22/2015	8/26/2015	1,427		0	1,350	77	0	0	0	77
21	F5 NETWORKS INC COM	315616102		1/22/2015	11/19/2015	41,156		0	44,565	-3,409	0	0	0	-3,409
22	F5 NETWORKS INC COM	315616102		9/9/2015	11/19/2015	208		0	245	-37	0	0	0	-37
23	FIDELITY ADV SMALL CAP	315805655		3/3/2015	8/26/2015	4,770		0	5,030	-260	0	0	0	-260
24	FIDELITY ADV SMALL CAP	315805655		3/3/2015	8/26/2015	28		2	30	0	0	0	0	0
25	FIDELITY ADV SMALL CAP	315805655		3/3/2015	8/26/2015	1		0	1	0	0	0	0	0
26	FIDELITY ADV SMALL CAP	315805655		9/9/2015	10/2/2015	12		0	13	-1	0	0	0	-1
27	FIDELITY ADV SMALL CAP	315805655		3/3/2015	10/2/2015	9		0	9	0	0	0	0	0
28	FIDELITY ADV SMALL CAP	315805655		3/3/2015	10/2/2015	71,540		0	76,197	-4,657	0	0	0	-4,657
29	FIDELITY ADV SMALL CAP	315805655		3/3/2015	11/16/2015	20		0	21	-1	0	0	0	-1
30	FIDELITY ADV SMALL CAP	315805655		3/17/2015	11/16/2015	29		0	30	-1	0	0	0	-1
31	FIDELITY ADV SMALL CAP	315805655		3/3/2015	11/16/2015	49,001		0	50,958	-1,957	0	0	0	-1,957
32	FIREEYE INC	31816Q101		1/7/2015	8/26/2015	15,895		0	13,326	2,569	0	0	0	2,569
33	FIREEYE INC	31816Q101		9/9/2015	12/3/2015	132		0	231	-99	0	0	0	-99
34	FIREEYE INC	31816Q101		1/7/2015	12/3/2015	27,991		0	39,510	-11,519	0	0	0	-11,519
35	GENERAC HLDGS INC	368736104		12/19/2014	6/11/2015	37,289		0	43,969	-6,680	0	0	0	-6,680
36	GENERAC HLDGS INC	368736104		12/23/2014	6/11/2015	52,341		0	60,875	-8,534	0	0	0	-8,534
37	HERSHEY COMPANY	427866108		4/14/2015	6/11/2015	6,643		0	7,393	-750	0	0	0	-750
38	HERSHEY COMPANY	427866108		12/19/2014	6/11/2015	21,386		0	24,560	-3,174	0	0	0	-3,174
39	HERSHEY COMPANY	427866108		2/13/2015	6/11/2015	1,547		0	1,803	-256	0	0	0	-256
40	HERSHEY COMPANY	427866108		12/26/2014	6/11/2015	182		0	213	-31	0	0	0	-31
41	HERSHEY COMPANY	427866108		12/24/2014	6/11/2015	28,575		0	33,417	-4,842	0	0	0	-4,842
42	ISHARES PHLX	464287523		4/28/2015	11/24/2015	50,794		0	53,253	-2,459	0	0	0	-2,459
43	ISHARES PHLX	464287523		6/11/2015	11/24/2015	72,242		0	78,850	-6,608	0	0	0	-6,608
44	ISHARES PHLX	464287523		9/9/2015	11/24/2015	5,026		0	4,759	267	0	0	0	267
45	JP MORGAN ETF TRUST SHS	46641Q209		3/24/2015	4/14/2015	104,190		0	102,905	1,285	0	0	0	1,285
46	ELI LILLY & CO	532457108		12/19/2014	8/26/2015	6,041		0	5,482	559	0	0	0	559
47	ELI LILLY & CO	532457108		12/19/2014	8/26/2015	4,690		0	4,319	371	0	0	0	371
48	LORD ABBETT GROWTH	543915292		12/19/2014	8/26/2015	22		0	22	0	0	0	0	0
49	LORD ABBETT GROWTH	543915292		12/19/2014	8/26/2015	16,987		45	17,032	0	0	0	0	0
50	LORD ABBETT GROWTH	543915292		12/19/2014	8/26/2015	22		0	22	0	0	0	0	0
51	LORD ABBETT GROWTH	543915292		8/21/2015	8/26/2015	19		0	19	0	0	0	0	0
52	LORD ABBETT GROWTH	543915292		12/19/2014	8/26/2015	2		0	2	0	0	0	0	0
53	LORD ABBETT CALIBRATED	54400M799		2/3/2015	11/11/2015	59,895		0	63,231	-3,336	0	0	0	-3,336
54	LORD ABBETT CALIBRATED	54400M799		2/13/2015	11/11/2015	5,363		0	5,754	-391	0	0	0	-391
55	LORD ABBETT CALIBRATED	54400M799		2/13/2015	11/11/2015	20		0	22	-2	0	0	0	-2
56	LORD ABBETT CALIBRATED	54400M799		4/14/2015	11/11/2015	12,794		0	13,856	-1,062	0	0	0	-1,062
57	LOCKHEED MARTIN CORP	539830109		6/11/2015	8/26/2015	11,000		0	10,498	502	0	0	0	502
58	LORD ABBETT GROWTH	543915292		12/19/2014	8/26/2015	7,149		19	7,168	0	0	0	0	0
59	LORD ABBETT CALIBRATED	54400M799		9/9/2015	11/11/2015	13		0	14	-1	0	0	0	-1
60	LORD ABBETT CALIBRATED	54400M799		9/9/2015	11/11/2015	1,965		0	1,921	44	0	0	0	44
61	MARKET VECTORS RETAIL E	57060U225		12/19/2014	6/11/2015	37,868		0	35,460	2,408	0	0	0	2,408
62	MARKET VECTORS RETAIL E	57060U225		12/24/2014	6/11/2015	51,197		0	48,559	2,638	0	0	0	2,638
63	MARKET VECTORS RETAIL E	57060U225		12/26/2014	6/11/2015	151		0	144	7	0	0	0	7
64	MARKET VECTORS RETAIL E	57060U225		2/13/2015	6/11/2015	6,059		0	6,068	-9	0	0	0	-9
65	MARKET VECTORS RETAIL E	57060U225		4/14/2015	6/11/2015	12,572		0	12,871	-299	0	0	0	-299
66	NOVO NORDISK A S ADR	670100205		12/23/2014	8/26/2015	765		0	610	155	0	0	0	155
67	OCCIDENTAL PETE CORP CA	674599105		12/19/2014	7/7/2015	20,346		0	21,972	-1,626	0	0	0	-1,626
68	OCCIDENTAL PETE CORP CA	674599105		12/22/2014	7/7/2015	27,470		0	29,869	-2,399	0	0	0	-2,399
69	PRUDENTIAL JENNISON	74441P866		8/6/2015	11/18/2015	27,396		0	31,242	-3,846	0	0	0	-3,846

Part IV (990-PF) - Capital Gains and Losses for Tax on Investment Income

	Amount
Long Term CG Distributions	723
Short Term CG Distributions	0

	Description of Property Sold	CUSIP #	Acquisition Method	Date Acquired	Date Sold	Gross Sales Price	Depreciation Allowed	Adjustments	Cost or Other Basis Plus Expense of Sale	Gain or Loss	FMV as of 12/31/69	Adjusted Basis as of 12/31/69	Excess of FMV Over Adjusted Basis	Gains Minus Excess FMV Over Adj Basis or Losses
						1,854,660	0	1,370	1,962,656	-106,626	0	0	0	-106,626
70	PRUDENTIAL JENNISON	74441P866		8/21/2015	11/18/2015	37		0	42	-5	0	0	0	-5
71	PRUDENTIAL JENNISON	74441P866		8/21/2015	11/18/2015	18,552		0	19,749	-1,197	0	0	0	-1,197
72	PRUDENTIAL JENNISON	74441P866		6/11/2015	11/18/2015	47,674		0	53,588	-5,914	0	0	0	-5,914
73	ST JUDE MEDICAL INC	790849103		12/19/2014	8/26/2015	5,932		0	5,866	66	0	0	0	66
74	SECTOR SPDR FINANCIAL	81369Y605		12/26/2014	8/26/2015	182		19	200	1	0	0	0	1
75	SECTOR SPDR FINANCIAL	81369Y605		12/26/2014	8/26/2015	2,587		0	2,857	-270	0	0	0	-270
76	STARBUCKS CORP	855244109		12/23/2014	8/26/2015	19,559		0	15,221	4,338	0	0	0	4,338
77	STARBUCKS CORP	855244109		12/19/2014	8/26/2015	39,326		0	30,111	9,215	0	0	0	9,215
78	VERIZON COMMUNICATNS C	92343V104		1/26/2015	8/26/2015	178		10	188	0	0	0	0	0
79	VERIZON COMMUNICATNS C	92343V104		1/26/2015	8/26/2015	7,422		0	7,857	-435	0	0	0	-435
80	ALLERGAN PLC	G0177J108		12/19/2014	8/26/2015	4,750		0	4,206	544	0	0	0	544
81	CATERPILLAR INC	149123101		12/19/2014	1/26/2015	33,475			35,577	-2,102	0	0	0	-2,102
82	CATERPILLAR INC	149123101		12/26/2014	1/26/2015	42,978			47,123	-4,145	0	0	0	-4,145
83	CELGENE CORP	151020104		12/19/2014	1/14/2015	21,841			21,258	583	0	0	0	583
84	ELI LILLY & CO	532457108		12/19/2014	1/6/2015	25,826		840	26,666	0	0	0	0	0
85	ELI LILLY & CO	532457108		12/19/2014	1/6/2015	628		21	649	0	0	0	0	0
86	MERCK AND CO INC	58933Y105		12/19/2014	1/6/2015	35,046		44	35,090	0	0	0	0	0
87	MERCK AND CO INC	58933Y105		12/19/2014	1/6/2015	7,755		10	7,765	0	0	0	0	0
88	NOVO NORDISK A S ADR	670100205		12/19/2014	1/14/2015	49,663			49,217	446	0	0	0	446
89	NOVO NORDISK A S ADR	670100205		12/23/2014	1/14/2015	30,742			30,304	438	0	0	0	438
90	SECTOR SPDR CONSMRS	81369Y308		12/19/2014	3/24/2015	43,804			43,680	124	0	0	0	124
91	SECTOR SPDR CONSMRS	81369Y308		12/24/2014	3/24/2015	58,715			59,533	-818	0	0	0	-818
92	SECTOR SPDR CONSMRS	81369Y308		12/26/2014	3/24/2015	342			346	-4	0	0	0	-4
93	SECTOR SPDR UTILITIES	81369Y886		12/19/2014	1/6/2015	44,026			43,651	375	0	0	0	375
94	SECTOR SPDR UTILITIES	81369Y886		12/24/2014	1/6/2015	8,332			8,409	-77	0	0	0	-77
95	SECTOR SPDR UTILITIES	81369Y886		12/24/2014	3/3/2015	47,445			51,077	-3,632	0	0	0	-3,632
96	SECTOR SPDR UTILITIES	81369Y886		2/13/2015	3/3/2015	888			917	-29	0	0	0	-29
97	STRATASYS LTD	M85548101		12/19/2014	2/3/2015	11,704			16,411	-4,707	0	0	0	-4,707
98	STRATASYS LTD	M85548101		12/24/2014	2/3/2015	15,292			22,099	-6,807	0	0	0	-6,807
99	STRATASYS LTD	M85548101		12/26/2014	2/3/2015	35,498			52,827	-17,329	0	0	0	-17,329

Part VIII, Line 1 (990-PF) - Compensation of Officers, Directors, Trustees and Foundation Managers

	Name	Check "X" if Business	Street	City	State	Zip Code	Foreign Country	Title	Avg Hrs Per Week	Compensation	Benefits	Expense Account
										0	0	0
1	FLORA MAJOR		35 WATERGATE DR - SUITE 903	SARASOTA	FL	34236		TRUSTEE	1 00	0		

Part VI, Line 6a (990-PF) - Estimated Tax Payments

		Date		Amount
1	Credit from prior year return		1	0
2	First quarter estimated tax payment		2	
3	Second quarter estimated tax payment		3	
4	Third quarter estimated tax payment	9/14/2015	4	108
5	Fourth quarter estimated tax payment	12/14/2015	5	81
6	Other payments		6	
7	Total		7	189