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Form 990-PF

Return of Private Foundation

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

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- Information about Form 990-PF and its instructions is at www.irs.gov/form990pf.

2015

Open to Public
Inspection

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

Name of foundation ALLEN FAMILY CHARITABLE TRUST		A Employer identification number 27-67699969
Number and street (or P O box number if mail is not delivered to street address) 760 BEAR GULCH ROAD		B Telephone number (see instructions) (650) 851-5881
City or town, state or province, country, and ZIP or foreign postal code WOODSIDE, CA 94062		
G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		C If exemption application is pending, check here <input type="checkbox"/> <input checked="" type="checkbox"/>
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		D 1. Foreign organizations, check here <input type="checkbox"/> <input checked="" type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/> <input checked="" type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 4,772,966	J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/> <input checked="" type="checkbox"/>
(Part I, column (d) must be on cash basis.)		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/> <input checked="" type="checkbox"/>

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))		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)	5,000,000			
	2 Check <input type="checkbox"/> <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	38	38	38	
	4 Dividends and interest from securities	58,468	58,468	58,468	
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	62,767			
	b Gross sales price for all assets on line 6a 497,206				
	7 Capital gain net income (from Part IV, line 2)		62,767		
	8 Net short-term capital gain			2,040	
	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	5,121,273	121,273	60,546	
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)				
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)				
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	15,984			
	24 Total operating and administrative expenses.	15,984	0	0	
	Add lines 13 through 23				
	25 Contributions, gifts, grants paid	86,350		86,350	
	26 Total expenses and disbursements. Add lines 24 and 25	102,334	0	86,350	
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	5,018,939			
	b Net investment income (if negative, enter -0-)		121,273		
	c Adjusted net income(if negative, enter -0-)			60,546	

Assets	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
1	Cash—non-interest-bearing		972	155,036	
2	Savings and temporary cash investments		26,323	6,727	
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)				
c	Investments—corporate bonds (attach schedule)		1,656,505	1,619,170	
11	Investments—land, buildings, and equipment basis ►				
	Less accumulated depreciation (attach schedule) ►				
12	Investments—mortgage loans				
13	Investments—other (attach schedule)		3,245,766	3,153,796	
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)		27,295	5,064,034	4,772,966
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 ►)		17,800	17,800	
23	Total liabilities (add lines 17 through 22)			17,800	
Liabilities	Foundations that follow SFAS 117, check here ► <input checked="" type="checkbox"/>				
	and complete lines 24 through 26 and lines 30 and 31.				
	24 Unrestricted		27,295	5,046,234	
25	Temporarily restricted				
26	Permanently restricted				
Net Assets or Fund Balances	Foundations that do not follow SFAS 117, check here ► <input type="checkbox"/>				
	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)		27,295	5,046,234	
31	Total liabilities and net assets/fund balances (see instructions)		27,295	5,064,034	

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	27,295
2	Enter amount from Part I, line 27a	2	5,018,939
3	Other increases not included in line 2 (itemize) ►	3	
4	Add lines 1, 2, and 3	4	5,046,234
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	5,046,234

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 (b) P—Purchase D—Donation	Date acquired (c) (mo, day, yr)	Date sold (d) (mo, day, yr)
1a	See Additional Data Table			
b				
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	See Additional Data Table			
b				
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 Losses (from col (h))
(i) FMV as of 12/31/69		Adjusted basis (j) as of 12/31/69	Excess of col (i) (k) over col (j), if any	(l)
a	See Additional Data Table			
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 62,767
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 2,040

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			
2013			
2012			
2011			
2010			
2 Total of line 1, column (d).			2
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
4 Enter the net value of noncharitable-use assets for 2015 from Part X, line 5.			4
5 Multiply line 4 by line 3.			5
6 Enter 1% of net investment income (1% of Part I, line 27b).			6
7 Add lines 5 and 6.			7
8 Enter qualifying distributions from Part XII, line 4.			8

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 <input type="checkbox"/> and enter "N/A" on line 1	1	2,425
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 <input type="checkbox"/> and enter 1% of Part I, line 27b	2	
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col. (b)	3	2,425
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	
3	Add lines 1 and 2.	5	2,425
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	6	
5	Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-	7	
6	Credits/Payments	8	
a	2015 estimated tax payments and 2014 overpayment credited to 2015	6a	
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	
8	Enter any penalty for underpayment of estimated tax Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8	58
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	2,483
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	
11	Enter the amount of line 10 to be Credited to 2015 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	11	

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	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 <input type="checkbox"/> \$ _____ (2) On foundation managers <input type="checkbox"/> \$ _____		
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ _____		
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	No
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	No
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.	5	No
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	No
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) <input type="checkbox"/> NY		
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	Yes
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	No

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 ► ROSS STRENT & CO LLP Telephone no ► (631) 629-4488 Located at ► 1860 WALT WHITMAN ROAD SUITE 900 MELVILLE NY ZIP +4 ► 117473098			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here ► <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year ► <input type="checkbox"/> 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? ► <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ► <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ► <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ► <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ► <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ► <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? ► <input type="checkbox"/> Organizations relying on a current notice regarding disaster assistance check here. ► <input type="checkbox"/>	1b	No
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? ► <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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	No
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? ► <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If "Yes," did it have excess business holdings in 2015 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015).	3b	No
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

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

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

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

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

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

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

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

b If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here. ►

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? 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?
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?

5b No6b No7b No**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	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
HARVEY ALLEN 760 BEAR GULCH ROAD WOODSIDE, CA 94062	Trustee 0 00	0		
LOIS ALLEN 642 JOHNSTON STREET APT 2 HALF MOON BAY, CA 940191984	Trustee 0 00	0		
DONNA ALLEN 760 BEAR GULCH ROAD WOODSIDE, CA 94062	Trustee 0 00	0		
RONALD BUTTNER 28 LAKE ROAD RFD 5 NEWTOWN, CT 06470	Trustee 0 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	Title, and average hours per week (b) devoted to position	(c) Compensation	Contributions to employee benefit plans and deferred compensation (d)	Expense account, (e) other allowances
NONE				
Total number of other employees paid over \$50,000.				

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	
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	

Total. Add lines 1 through 3 ►

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

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	
2a	Tax on investment income for 2015 from Part VI, line 5.	2a	2,425
b	Income tax for 2015 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	2,425
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	2,425
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	2,425
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	0

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	86,350
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	86,350
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	86,350

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				0
2 Undistributed income, if any, as of the end of 2015				
a Enter amount for 2014 only.				
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2015				
a From 2010.				
b From 2011.	2,500			
c From 2012.	1,900			
d From 2013.	1,900			
e From 2014.	5,000			
f Total of lines 3a through e.		11,300		
4 Qualifying distributions for 2015 from Part XII, line 4 ► \$ _____ 86,350				
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).	0			
d Applied to 2015 distributable amount.				
e Remaining amount distributed out of corpus		86,350		
5 Excess distributions carryover applied to 2015 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	97,650			
b Prior years' undistributed income Subtract line 4b from line 2b				
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				
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).				
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.		97,650		
10 Analysis of line 9				
a Excess from 2011.	2,500			
b Excess from 2012.	1,900			
c Excess from 2013.	1,900			
d Excess from 2014.	5,000			
e Excess from 2015.	86,350			

Part XIV 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 <input type="checkbox"/> 4942(j)(3) or <input type="checkbox"/> 4942(j)(5)				
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))

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	86,350
b Approved for future payment				
Total			► 3b	

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

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.					38	
4 Dividends and interest from securities.					58,468	
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					60,727	2,040
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).					60,727	60,546
13 Total Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calculations)					13	121,273

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

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

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.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
44 478 ASTON/FAIRPONTE MID CAP FUND CL	P	2015-08-28	2015-11-06
1870 40 BLACKROCK INTERNATIONAL INDEX FUND	P	2015-08-28	2015-11-06
1357 452 BROWN ADVISORY FDS WMC STRATEGIC	P	2015-08-28	2015-11-06
1285 062 CAUSEWAY CAP MGMT	P	2015-08-28	2015-08-31
240 546 DODGE & COX FUNDS	P	2015-08-28	2015-08-31
86 DEUTSCHE X TRACKERS MSCI EAFE	P	2015-08-31	2015-11-06
941 797 GOLDMAN SACHS SMALL CAP	P	2015-08-28	2015-11-06
350 ISHARES MSCI EAFE ETF	P	2015-08-28	2015-08-31
276 797 OAKMARK FUND	P	2015-08-28	2015-11-06
263 655 HARBOR INTERNATIONAL FUND	P	2015-08-28	2015-11-06

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis (h) plus expense of sale	(h) (e) plus (f) minus (g)
1,740		1,668	72
22,875		23,043	-168
13,492		13,412	80
18,993		19,032	-39
9,497		9,521	-24
2,433		2,342	91
52,053		50,000	2,053
21,007		21,147	-140
18,543		17,568	975
16,927		16,982	-55

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			72
			-168
			80
			-39
			-24
			91
			2,053
			-140
			975
			-55

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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.)
1068 297 JP MORGAN TRI	P	2015-08-28	2015-11-06
1047 998 JP MORGAN TRI SMALL CAP	P	2015-08-28	2015-11-16
124 828 JP MORGAN VALUE ADVANTAGE FD	P	2015-08-28	2015-11-06
344 701 MASSACHUSETTS INVESTORS TRUST-CL I	P	2015-08-28	2015-11-06
829 SPDR S&P 500 ETF TRUST	P	2015-08-28	2015-11-06
88 WISDOMTREE JAPAN HEDGED EQUITY	P	2015-08-28	2015-11-06
158 WISDOMTREE JAPAN HEDGED EQUITY	P	2015-08-28	2015-11-06
74 085 WELLS FARGO ADVANTAGE	P	2015-08-28	2015-11-06
Capital Gain Dividends			

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
15,886		15,199	687
51,258		50,000	1,258
3,710		3,603	107
9,914		9,576	338
160,938		164,760	-3,822
4,617		4,617	
8,663		8,159	504
3,933		3,810	123
			60,727

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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) FMV as of 12/31/69	Adjusted basis (j) as of 12/31/69	Excess of col (i) (k) over col (j), if any	
			687
			1,258
			107
			338
			-3,822
			504
			123

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				
UNTIL THERES A CURE FOUNDATION 560 MOUNTAIN OME ROAD REDWOOD CITY, CA 94062	None	EOF	TO EXTEND FINANCIAL AID OR ASSISTANCE FOR THE SUPPORT AND MAINTENANCE OF MEDICAL AID, HOSPITAL CARE, OR MEDICAL RESEARCH PURPOSES	10,250
CULINARY INSTITUTE OF AMERICA 1946 CAMPUS DR HYDE PARK, NY 12538	None	EOF	TO EXTEND FINANCIAL AID OR ASSISTANCE FOR THE SUPPORT AND MAINTENANCE OF EDUCATION	20,000
KQED 2601 MARIPOSA STREET SAN FRANCISCO, CA 94110	None	EOF	TO EXTEND FINANCIAL AID OR ASSISTANCE FOR THE SUPPORT AND MAINTENANCE OF EDUCATIONAL SERVICES	10,000
NATIONAL RESOURCE DEFENSE FUND 40 W 20TH ST NY, NY 10011	None	EOF	TO EXTEND FINANCIAL AID OR ASSISTANCE FOR THE SUPPORT AND MAINTENANCE OF SAFEGUARDING THE EARTH, ITS PEOPLE, ITS PLANTS AND ANIMALS AND THE NATURAL SYSTEMS ON WHICH ALL LIFE DEPENDS	5,000
PENINSULA OPEN SPACE TRUST 222 HIGH STREET PALO ALTO, CA 94301	None	EOF	TO EXTEND FINANCIAL AID OR ASSISTANCE FOR THE SUPPORT AND MAINTENANCE OF PROTECTING THE NATURAL LANDS IN AND AROUND SILICON VALLEY	5,000
SOLVE MECFS INITIATIVE 5455 WILSHIRE BLVD 806 LOS ANGELES, CA 90036	None	EOF	TO EXTEND FINANCIAL AID OR ASSISTANCE FOR THE SUPPORT AND MAINTENANCE OF MEDICAL AID, HOSPITAL CARE, OR MEDICAL RESEARCH PURPOSES	5,000
TIDES FOUNDATION 55 EXCHANGE PL 402 NY, NY 10004	None	EOF	TO EXTEND FINANCIAL AID OR ASSISTANCE FOR THE SUPPORT AND MAINTENANCE OF INNOVATING PARTNERS TO ACCELERATE TOWARD A WORLD OF SHARED PROSPERITY AND SOCIAL JUSTICE	15,000
ALEMEDA COUNTY COMMUNITY FOOD BANK 7900 EDGEWATER DR OAKLAND, CA 94621	None	EOF	TO EXTEND FINANCIAL AID OR ASSISTANCE FOR THE SUPPORT OF PROVIDING FOOD TO THOSE WHO NEED IT	150
AMERICAN CANCER SOCIETY 50 KENNEDY DR PLAINVIEW, NY 11803	None	EOF	TO EXTEND FINANCIAL AID OR ASSISTANCE FOR THE SUPPORT AND MAINTENANCE OF HOSPITAL CARE, OR MEDICAL RESEARCH PURPOSES	200
AMERICAN RED CROSS 11355 OHIO AVENUE LOS ANGELES, CA 90025	None	EOF	TO EXTEND FINANCIAL AID OR ASSISTANCE	1,000
CALIFORNIA STATE PARKS 50 FRANCISCO STREET SUITE 110 SAN FRANCISCO, CA 94133	None	EOF	TO EXTEND FINANCIAL AID OR ASSISTANCE	100
COMPATIABLE TECHNOLOGIES SAINT PAUL 800 TRANSFER RD 6 ST PAUL, MN 55114	None	EOF	TO EXTEND FINANCIAL AID OR ASSISTANCE	150
CURAMERICA 318 W MILLBROOK RD 105 RALIEGH, NC 27609	None	EOF	TO EXTEND FINANCIAL AID OR ASSISTANCE	100
DIG BUWALA ORPHANAGE PROJECT 999 PEACHTREE STREET NE SUITE 2300 ATLANTA, GA 30309	None	EOF	TO EXTEND FINANCIAL AID OR ASSISTANCE	500
DOCTORS WITHOUT BORDERS 333 7TH AVENUE NY, NY 10001	None	EOF	TO EXTEND FINANCIAL AID OR ASSISTANCE	1,000
Total.				86,350

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				
ECUMENCIAL HUNGER PROGRAM 2411 PULGAS AVE EAST PALO ALTO, CA 94303	None	EOF	TO EXTEND FINANCIAL AID OR ASSISTANCE	500
FOUNDATION FOR COLLEGE EDUCATION 2160 EUCLID AVE EAST PALO ALTO, CA 94303	None	EOF	TO EXTEND FINANCIAL AID OR ASSISTANCE	250
FREIGHT SALVAGE 2020 ADDISON ST BERKELEY, CA 94704	None	EOF	TO EXTEND FINANCIAL AID OR ASSISTANCE	300
GAIA GLOBAL AIDS INTERFAITH ALLIANCE 2171 FRANCISO BLVD E SAN RAFAEL, CA 94901	None	EOF	TO EXTEND FINANCIAL AID OR ASSISTANCE	200
GLOBAL FUND FOR WOMEN 800 MARKET STREET 7TH FLOOR SAN FRANCISO, CA 94102	None	EOF	TO EXTEND FINANCIAL AID OR ASSISTANCE	100
GREAT NECK SOCIAL CENTER 80 GRACE AVE GREAT NECK, NY 11021	None	EOF	TO EXTEND FINANCIAL AID OR ASSISTANCE	2,000
HABITAT FOR HUMANITY 121 HABITAT STREET AMERICUS, GA 31709	None	EOF	TO EXTEND FINANCIAL AID OR ASSISTANCE	1,000
HALFMONBAY COASTSIDE ADULT DAYCAR 925 MAIN ST HALF MOON BAY, CA 94019	None	EOF	TO EXTEND FINANCIAL AID OR ASSISTANCE	500
HALFMONBAY COASTSIDE LIBRARY 620 CORREAS ST HALF MOON BAY, CA 94019	None	EOF	TO EXTEND FINANCIAL AID OR ASSISTANCE	1,000
HALFBAYMOON BAY COASTSIDE SENIOR CE 925 MAIN STREET HALF MOON BAY, CA 94019	None	EOF	TO EXTEND FINANCIAL AID OR ASSISTANCE	1,000
HEIFER INTERNATIONAL 1 WORLD AVENUE LITTLE ROCK, AR 72202	None	EOF	TO EXTEND FINANCIAL AID OR ASSISTANCE	500
HOSPICE 1731 KING STREET ALEXANDRIA, VA 22314	None	EOF	TO EXTEND FINANCIAL AID OR ASSISTANCE	200
MUSEUM OF ARTS DESIGN 2 COLUMBUS CIRCLE NY, NY 10019	None	EOF	TO EXTEND FINANCIAL AID OR ASSISTANCE	1,000
NATIONAL PARKS CONSERVATION 777 6TH STREET NW SUITE 700 WASHINGTON, DC 20001	None	EOF	TO EXTEND FINANCIAL AID OR ASSISTANCE	200
OPERA THEATRE ST LOUIS 210 HAZEL AVE ST LOUIS, MO 63119	None	EOF	TO EXTEND FINANCIAL AID OR ASSISTANCE	250
Total			► 3a	86,350

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				
POSITIVE COACHING ALLIANCE 1001 N RENGSTORFF AVE SUITE 100 MOUNTAIN VIEW, CA 94043	None	EOF	TO EXTEND FINANCIAL AID OR ASSISTANCE	250
RONALD MCDONALD HOUSE 1 KROC DRIVE OAK BROOK, IL 60523	None	EOF	TO EXTEND FINANCIAL AID OR ASSISTANCE	200
SECOND HARVEST FOOD 750 CURTNER AVE SAN JOSE, CA 95125	None	EOF	TO EXTEND FINANCIAL AID OR ASSISTANCE	500
STANFORD UNIVERSITY ATHLETICS 641 CAMPUS DRIVE STANFORD, CA 94305	None	EOF	TO EXTEND FINANCIAL AID OR ASSISTANCE	500
STANFORD UNIVERSITY GSB 655 KNIGHT WAY STANFORD, CA 94305	None	EOF	TO EXTEND FINANCIAL AID OR ASSISTANCE	250
UNIVERSITY OF MISSOURI 353 E SIX FORKS ROAD SUITE 200 RALEIGH, NC 27609	None	EOF	TO EXTEND FINANCIAL AID OR ASSISTANCE	500
WELL BODY ALLIANCEPARTNERS IN HEALT PO BOX 400789 CAMBRIDGE, MA 02140	None	EOF	TO EXTEND FINANCIAL AID OR ASSISTANCE	250
WOMENS SPORTS FOUNDATION 247 WEST 30TH STREET SUITE 7R NY, NY 10001	None	EOF	TO EXTEND FINANCIAL AID OR ASSISTANCE	500
WORLD WILDLIFE FOUNDATION 1250 24TH STREET NW WASHINGTON, DC 20037	None	EOF	TO EXTEND FINANCIAL AID OR ASSISTANCE	250
WOUNDED WARRIOR PROJECT 4899 BELFORT ROAD SUITE 300 JACKSONVILLE, FL 32256	None	EOF	TO EXTEND FINANCIAL AID OR ASSISTANCE	500
YOSEMITE CONSERVANCY 101 MONTGOMERY STREET SUITE 1700 SAN FRANCISCO, CA 94104	None	EOF	TO EXTEND FINANCIAL AID OR ASSISTANCE	200
Total				86,350

TY 2015 Investments Corporate Bonds Schedule

Name: ALLEN FAMILY CHARITABLE TRUST

EIN: 27-6799969

Software ID: 15000324

Software Version: 2015v2.0

Name of Bond	End of Year Book Value	End of Year Fair Market Value
BLACKROCK FDS	229,242	213,273
DODGE & COX INCOME FUND	152,425	149,646
FEDERATED INSTITUTIONAL	76,145	71,750
JP MORGAN SHORT DURATION	225,864	224,619
JPMORGAN TR II	101,030	99,822
JP MORGAN TR II	102,094	95,478
PIMCO SHORT TERM FUND	339,937	338,209
T ROWE PRICE NEW INCOME	125,801	124,602
VANGUARD SHORT TERM BOND	303,967	301,771

TY 2015 Investments - Other Schedule

Name: ALLEN FAMILY CHARITABLE TRUST**EIN:** 27-6799969**Software ID:** 15000324**Software Version:** 2015v2.0

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
ASTON/FAIRPOINTE MID CAP	AT COST	51,268	48,148
BLACK ROCKFDS	AT COST	243,924	242,730
BLACKROCK INTERNATIONAL	AT COST	228,400	219,248
BROWN ADVISORY FDS	AT COST	96,379	99,098
CAUSEWAY CAP MGMT TR	AT COST	203,728	193,815
DEUTSCHE X TRACKERS MSCI	AT COST	96,712	96,445
DODGE & COX FUNDS	AT COST	102,124	94,314
HARBOR INTERNATIONAL FUND	AT COST	153,828	142,488
ISHARES MSCI EAFE ETF	AT COST	225,060	218,732
JP MORGAN VALUE	AT COST	149,502	144,802
JP MORGAN TR I	AT COST	52,385	49,022
JP MORGAN TR I	AT COST	379,624	369,022
MASSACHUSETTS INVESTORS	AT COST	332,627	319,115
OAKMARK FUND	AT COST	362,485	359,054
SPDR S&P 500 ETF TRUST	AT COST	309,844	317,833
WELLS FARGO	AT COST	163,327	148,234
WISDOMTREE JAPAN HEDGED	AT COST	94,549	91,696

TY 2015 Other Expenses Schedule

Name: ALLEN FAMILY CHARITABLE TRUST

EIN: 27-6799969

Software ID: 15000324

Software Version: 2015v2.0

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FILING FEES	25			
MANAGEMENT FEES	15,959			

TY 2015 Other Liabilities Schedule

Name: ALLEN FAMILY CHARITABLE TRUST**EIN:** 27-6799969**Software ID:** 15000324**Software Version:** 2015v2.0

Description	Beginning of Year - Book Value	End of Year - Book Value
CREDIT CARDS PAYABLE		17,800