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Form

990-PF

Department of the Treasury
Internal Revenue Service

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.

OMB No 1545-0052

2015

Open to Public Inspection

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

Name of foundation GEORGE L SLOAN FOUNDATION 450029012		A Employer identification number 34-7130472	
Number and street (or P O box number if mail is not delivered to street address) C/O FARMERS TRUST CO 42 MCCLURG R		B Telephone number (see instructions) (330) 743-7000	
City or town, state or province, country, and ZIP or foreign postal code YOUNGSTOWN, OH 44512		C If exemption application is pending, check here <input type="checkbox"/>	
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		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input 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		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ 225,516		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
J Accounting method <input type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)			

Part I Analysis of Revenue and Expenses <i>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))</i>		Revenue and expenses per books (a)	Net investment income (b)	Adjusted net income (c)	Disbursements for charitable purposes (d) (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)				
	2 Check ▶ <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	5,895	5,895		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	10,539			
	b Gross sales price for all assets on line 6a 94,880				
	7 Capital gain net income (from Part IV, line 2)		10,539		
	8 Net short-term capital gain			0	
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	16,434	16,434		
	13 Compensation of officers, directors, trustees, etc	2,394	1,675		718
	14 Other employee salaries and wages		0	0	0
	15 Pension plans, employee benefits		0	0	
	16a Legal fees (attach schedule).				0
	b Accounting fees (attach schedule).	1,660	415	0	1,245
	c Other professional fees (attach schedule)				0
	17 Interest				0
	18 Taxes (attach schedule) (see instructions)	124	15		0
	19 Depreciation (attach schedule) and depletion . . .	0	0		
	20 Occupancy				
	21 Travel, conferences, and meetings.		0	0	
	22 Printing and publications		0	0	
	23 Other expenses (attach schedule).	100			100
	24 Total operating and administrative expenses. Add lines 13 through 23	4,278	2,105	0	2,063
	25 Contributions, gifts, grants paid	0			0
	26 Total expenses and disbursements. Add lines 24 and 25	4,278	2,105	0	2,063
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	12,156			
	b Net investment income (if negative, enter -0-)		14,329		
	c Adjusted net income (if negative, enter -0-)			0	

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	16,650	16,627	16,627
	3	Accounts receivable ▶ _____			
		Less allowance for doubtful accounts ▶ _____		0	0
	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 ▶ _____ 0			
	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)	27,866	45,471	46,578
	c	Investments—corporate bonds (attach schedule)	141,039	96,249	97,306
	11	Investments—land, buildings, and equipment basis ▶ _____			
	Less accumulated depreciation (attach schedule) ▶ _____				
12	Investments—mortgage loans.				
13	Investments—other (attach schedule)	29,880	69,016	65,005	
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)	215,435	227,363	225,516	
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	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds	215,435	227,363	
	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)	215,435	227,363	
31	Total liabilities and net assets/fund balances(see instructions)	215,435	227,363		

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	215,435
2	Enter amount from Part I, line 27a	2	12,156
3	Other increases not included in line 2 (itemize) ▶ _____	3	2
4	Add lines 1, 2, and 3	4	227,593
5	Decreases not included in line 2 (itemize) ▶ _____	5	230
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	227,363

Part IV

Capital Gains and Losses for Tax on Investment Income

List and describe the kind(s) of property sold (e g , real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co)		How acquired P—Purchase (b) D—Donation	Date acquired (c) (mo , day, yr)	Date sold (d) (mo , day, yr)
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 (l) Losses (from col (h))
(i) F M V as of 12/31/69	Adjusted basis (j) as of 12/31/69	Excess of col (i) (k) over col (j), if any	
a See Additional Data Table			
b			
c			
d			
e			

2	Capital gain net income or (net capital loss)	<div><div>If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7</div></div>	2	10,539
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) <div>If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8</div>		3	

Part V

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

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

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2014	6,477	227,819	0 02843
2013	13,472	229,932	0 058591
2012	13,830	234,195	0 059053
2011	14,167	241,980	0 058546
2010	11,604	239,857	0 048379

2	Total of line 1, column (d).	2	0 252999
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 0506
4	Enter the net value of noncharitable-use assets for 2015 from Part X, line 5.	4	224,928
5	Multiply line 4 by line 3.	5	11,381
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	143
7	Add lines 5 and 6.	7	11,524
8	Enter qualifying distributions from Part XII, line 4.	8	2,063

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

Part VI

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

1a

Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1
Date of ruling or determination letter _____
(attach copy of letter if necessary—see instructions)

b

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

c

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

2

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

2

0

3

Add lines 1 and 2.

3

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4

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

4

0

5

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

5

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6

Credits/Payments

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

0

d

Backup withholding erroneously withheld.

6d

7

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

7

0

8

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

8

0

9

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

9

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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** ☐ 0 **Refunded** ☐

11

0

Part VII-A

Statements Regarding Activities

1a

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

1a

No

b

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

1b

No

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 ☐ \$ _____ **(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

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

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

Yes

7

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

7

Yes

8a

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

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 NONE	13	Yes	
14	The books are in care of FARMERS TRUST COMPANY Telephone no (330) 743-7000 Located at 42 MCCLURG ROAD YOUNGSTOWN OH ZIP+4 44512			
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 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		
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? <input type="checkbox"/>	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). <input type="checkbox"/>	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? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015.</i>) <input type="checkbox"/>	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2015?	4b		No

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

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?

6b

No

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

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
FARMERS TRUST COMPANY	TRUSTEE	2,394		
42 MCCLURG ROAD	2			
YOUNGSTOWN, OH 44512				

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.

0

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

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	206,131
b	Average of monthly cash balances.	1b	22,222
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	228,353
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	228,353
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	3,425
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	224,928
6	Minimum investment return. Enter 5% of line 5.	6	11,246

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	11,246
2a	Tax on investment income for 2015 from Part VI, line 5.	2a	287
b	Income tax for 2015 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	287
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	10,959
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	10,959
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	10,959

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	2,063
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	0
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	0
b	Cash distribution test (attach the required schedule).	3b	0
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	2,063
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	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	2,063
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				10,959
2 Undistributed income, if any, as of the end of 2015				
a Enter amount for 2014 only.			0	
b Total for prior years 2013 , 20 , 20		0		
3 Excess distributions carryover, if any, to 2015				
a From 2010.	0			
b From 2011.	0			
c From 2012.	0			
d From 2013.	1,792			
e From 2014.	0			
f Total of lines 3a through e.	1,792			
4 Qualifying distributions for 2015 from Part XII, line 4 \$ 2,063				
a Applied to 2014, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2015 distributable amount.				2,063
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2015 (If an amount appears in column (d), the same amount must be shown in column (a).)	1,792			1,792
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0			
b Prior years' undistributed income Subtract line 4b from line 2b		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount —see instructions		0		
e Undistributed income for 2014 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015				7,104
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2010 not applied on line 5 or line 7 (see instructions). . .	0			
9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a	0			
10 Analysis of line 9				
a Excess from 2011.	0			
b Excess from 2012.	0			
c Excess from 2013.	0			
d Excess from 2014.	0			
e Excess from 2015.	0			

Part XIV

b Check box to indicate whether the organization is a private operating foundation described in section 170(c)(2)(B)(i) or 170(c)(2)(B)(ii): ☐ 170(c)(2)(B)(i) or ☐ 170(c)(2)(B)(ii)

b 85% of line 2a

d Amounts included in line 2c not used directly for active conduct of exempt activities

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

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))

NONE

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

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

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

Form **990-PF** (2015)

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2015)

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)
8 AMERICAN EXPRESS CO COM		2015-01-07	2015-04-22
3 AMERISOURCEBERGEN CORP		2013-05-31	2015-01-28
2 AMERISOURCEBERGEN CORP		2013-05-31	2015-05-13
10 AMERISOURCEBERGEN CORP		2013-05-31	2015-08-12
1 ANTHEM INC		2013-07-11	2015-05-13
2 ANTHEM INC		2013-07-11	2015-06-23
2 ANTHEM INC		2013-07-11	2015-11-20
18 ARCHER DANIELS MIDLAND CO COM		2015-11-03	2015-12-16
1 BARD C R INC		2015-01-28	2015-11-11
3 CVS/CAREMARK CORP		2014-01-15	2015-01-28

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 plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
624		721	-97
287		164	123
229		109	120
1,030		546	484
160		85	75
339		171	168
258		171	87
630		780	-150
184		177	7
302		205	97

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			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			-97
			123
			120
			484
			75
			168
			87
			-150
			7
			97

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)
3 CVS/CAREMARK CORP			2015-06-10
27 CHESAPEAKE ENERGY CORP		2015-06-10	2015-06-17
15 CHESAPEAKE ENERGY CORP		2014-05-14	2015-06-17
10 CHEVRONTEXACO CORP		2013-05-31	2015-08-26
4 CHEVRONTEXACO CORP		2015-03-18	2015-08-26
10 CITIGROUP INC NEW		2013-05-31	2015-01-14
1 CUMMINS INC		2015-02-25	2015-10-28
253 426 EUROPACIFIC GROWTH FUND F2		2010-09-27	2015-05-18
6 F5 NETWORKS INC			2015-07-15
5 F5 NETWORKS INC		2015-06-10	2015-08-05

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 plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
306		217	89
332		356	-24
185		415	-230
714		1,246	-532
286		415	-129
482		530	-48
102		142	-40
13,239		10,000	3,239
709		647	62
663		632	31

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			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			89
			-24
			-230
			-532
			-129
			-48
			-40
			3,239
			62
			31

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)	How acquired P—Purchase (b) D—Donation	Date acquired (c) (mo , day, yr)	(d) Date sold (mo , day, yr)
4 667 FOUR CORNERS PPTY TRUST INC		2015-06-10	2015-12-02
5 333 FOUR CORNERS PPTY TRUST INC			2015-12-02
7 GENERAL ELEC CO COM		2013-05-31	2015-04-29
10000 GENERAL ELECTRIC CO 5 250% 12/06/17		2008-08-21	2015-07-20
2 GOLDMAN SACHS GROUP INC		2014-03-05	2015-10-21
3 HCA HOLDINGS INC		2014-01-14	2015-01-28
4 HCA HOLDINGS INC		2014-01-14	2015-03-11
2 HCA HOLDINGS INC		2014-01-14	2015-06-10
10 HCA HOLDINGS INC			2015-11-11
25000 HSBC FINANCE CORP 3 300% 08/15/15		2010-08-09	2015-08-15

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)
96		103	-7
109		81	28
189		166	23
10,689		9,790	899
367		342	25
216		154	62
284		205	79
165		102	63
678		507	171
25,000		25,000	

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	
			-7
			28
			23
			899
			25
			62
			79
			63
			171

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)
5 HELMERICH & PAYNE		2013-11-21	2015-01-07
16 INTEL CORP COM		2013-10-02	2015-01-07
39 INTEL CORP COM		2013-10-02	2015-04-17
5 INTERNATIONAL BUSINESS MACHINES		2013-05-31	2015-01-07
1 JOHNSON & JOHNSON COM		2013-05-31	2015-05-13
11 268 JPMORGAN SMALL CAP CORE FUND SELECT		2013-12-20	2015-05-18
14 KRAFT FOODS GROUP INC		2014-03-28	2015-03-26
10000 MERCK & CO INC 4 750% 03/01/15		2008-05-22	2015-03-01
4 MICROSOFT CORP COM		2013-05-31	2015-03-18
88 626 OPPENHEIMER DEVELOPING MARKETS INSTIT CLASS		2010-09-27	2015-05-18

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 plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
296		396	-100
573		366	207
1,265		891	374
773		1,057	-284
101		86	15
639		615	24
1,176		780	396
10,000		10,000	
165		141	24
3,243		2,917	326

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			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			-100
			207
			374
			-284
			15
			24
			396
			24
			326

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)
63 269 OPPENHEIMER DEVELOPING MARKETS INSTIT CLASS		2010-09-27	2015-06-10
6 PNC FINL SVCS GROUP INC COM		2013-05-31	2015-04-22
1 PNC FINL SVCS GROUP INC COM		2013-05-31	2015-06-10
6 PNC FINL SVCS GROUP INC COM		2013-05-31	2015-07-29
19 ROBERT HALF INTERNATIONAL			2015-02-24
91 859 ROWE T PRICE MID-CAP GROWTH FUND		2009-05-08	2015-05-18
15 ROYAL DUTCH SHELL PLC ADR A		2013-05-31	2015-03-18
2 SIMON PROPERTY GROUP INC		2014-03-05	2015-01-15
4 VALERO ENERGY CORP NEW		2013-05-31	2015-09-17
4 VALERO ENERGY CORP NEW		2013-05-31	2015-11-03

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 plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
2,221		2,083	138
544		435	109
99		73	26
588		435	153
1,197		740	457
7,596		4,177	3,419
887		1,006	-119
397		309	88
239		166	73
279		166	113

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			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			138
			109
			26
			153
			457
			3,419
			-119
			88
			73
			113

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)
9 VALERO ENERGY CORP NEW		2013-05-31	2015-12-11
8 VERIZON COMMUNICATIONS		2013-05-31	2015-01-28
22 WEC ENERGY GROUP INC		2015-06-10	2015-08-05
15 WEC ENERGY GROUP INC			2015-08-05
27 WHOLE FOODS MKT INC			2015-11-03
CAPITAL GAIN DIVIDENDS	P		

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 plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
627		373	254
374		396	-22
1,069		999	70
729		708	21
847		1,262	-415
			287

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			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			254
			-22
			70
			21
			-415

TY 2015 Accounting Fees Schedule

Name: GEORGE L SLOAN FOUNDATION 450029012

EIN: 34-7130472

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX PREPARATION FEE (NON-ALLOC	1,660	415		1,245

TY 2015 Investments Corporate Bonds Schedule**Name:** GEORGE L SLOAN FOUNDATION 450029012**EIN:** 34-7130472

Name of Bond	End of Year Book Value	End of Year Fair Market Value
10,000 OCCIDENTAL PETR 1.750%	10,085	10,020
25,000 COCA COLA 1.650% 3/14/	25,788	25,173
10,000 GEN ELECTRIC 5.250%		
10,000 MERCK & CO 4.75% 3/1/15		
25,000 MICROSOFT 4.200% 6/1/19	25,311	27,038
10,000 DU PONT 1.950% 1/15/16	10,065	10,003
25,000 HSBC FINANCE 3.300%		
25,000 GOLDMAN SACHS 2.350%	25,000	25,072

TY 2015 Investments Corporate Stock Schedule

Name: GEORGE L SLOAN FOUNDATION 450029012
EIN: 34-7130472

Name of Stock	End of Year Book Value	End of Year Fair Market Value
16 SHS ACTIVISION BLIZZARD	608	619
3 SHS AMGEN INC	478	487
15 SHS AMERISOURCEBERGEN CORP		
13 SHS APPLE COMPUTER	1,676	1,368
4 SHS BARD C R INC	677	758
10 SHS CHEVRON CORP		
43 SHS CISCO SYS INC	1,214	1,168
10 SHS CITIGROUP INC NEW		
30 SHS CBRE GROUP	1,066	1,037
18 SHS EASTMAN CHEMICAL CO	1,407	1,215
8 SHS CME GROUP	729	725
50 SHS GENERAL ELEC CO		
5 SHS HELMERICH & PAYNE		
16 SHS CERNER CORP	1,000	963
10 SHS HONEYWELL INTERNAT'L	798	1,036
55 SHS INTEL CORP		
5 SHS IBM		
20 SHS JOHNSON & JOHNSON	1,868	2,054
26 SHS COGNIZANT TECH SOLUTION	1,632	1,561
67 SHS CORNING INC	1,396	1,225
4 SHS CUMMINS INC	569	352
30 SHS MICROSOFT CORPORATION	1,101	1,664
23 SHS NUCOR CORP	1,056	927
13 SHS PNC FINL SVCS GR		
17 SHS EXXON MOBIL CORP	1,213	1,325
61 SHS GENERAL ELECTRIC	1,526	1,900
48 SHS QUANTA SERVICES INC	1,400	972
19 SHS ROBERT HALF INTERNAT'L		
15 SHS ROYAL DUTCH SHELL PLC A		
22 SHS GLAXOSMITHKLINE PLC	907	888

Name of Stock	End of Year Book Value	End of Year Fair Market Value
15 SHS TRAVELERS COMPANIES INC	1,332	1,693
17 SHS VALERO ENERGY CORP NEW		
27 SHS VERIZON COMMUNICATIONS	1,277	1,248
71 SHS HOST HOTELS & RESORTS I	1,473	1,089
5 SHS ANTHEM INC		
25 SHS ANALOG DEVICES INC	1,499	1,383
16 SHS CVS HEALTH CORP	1,265	1,564
15 SHS CHESAPEAKE ENERGY CORP		
5 SHS CONSTELLATION BRANDS	440	712
30 SHS DARDN RESTAURANTS	1,483	1,909
18 SHS DISNEY WALT CO	1,698	1,891
3 SHS FEDEX CORP	493	447
6 SHS F5 NETWORKS INC		
7 SHS GOLDMAN SACHS GR INC	1,408	1,262
19 SHS HCA HOLDINGS INC		
14 SHS KRAFT FOODS GR INC		
23 SHS NATIONAL OILWELL VARCO	1,284	770
15 SHS PEPSICO INC	1,422	1,499
26 SHS TJX COMPANIES	1,606	1,844
15 SHS WISCONSIN ENERGY CORP		
14 SHS NEXTERA ENERGY	1,467	1,454
9 SHS OCCIDENTAL PETROLEUM CO	705	608
29 SHS PUBLIC SERVICE ENTERPRI	1,189	1,122
40 SHS TYSON FOODS	1,582	2,133
22 SHS VISA INC	1,527	1,706

TY 2015 Investments - Other Schedule**Name:** GEORGE L SLOAN FOUNDATION 450029012**EIN:** 34-7130472

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
253.839 PIMCO COMM REAL RETU	AT COST	3,862	1,602
91.859 T ROWE PRICE MDCP GR			
253.426 EUROPACIFIC GR FD F2			
151.895 OPPENHEIMER DEV MK			
75.000 VG REIT INDEX ETF	AT COST	3,931	5,980
45.547 JPMORGAN SM CAP CORE	AT COST	2,444	2,101
38.000 SPDR S&P REGIONAL BK	AT COST	1,637	1,593
2.000 SIMON PROPERTY GROUP			
1,146.017 BLACKROCK GNMA INSTI	AT COST	11,242	11,208
735.830 DREYFUS STANDISH GLO	AT COST	15,739	15,497
1,165.269 FED INSTIT HIGH YD B	AT COST	11,593	10,592
206.567 GOLDMAN SACHS SM/MD	AT COST	4,752	4,193
729.843 IVY INTERN'L CORE EQ	AT COST	13,816	12,239

TY 2015 Other Decreases Schedule

Name: GEORGE L SLOAN FOUNDATION 450029012

EIN: 34-7130472

Description	Amount
LT WASH SALE ADJUSTMENT	230

TY 2015 Other Expenses Schedule

Name: GEORGE L SLOAN FOUNDATION 450029012

EIN: 34-7130472

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
STATE OF OHIO FILING FEE	100	0		100

TY 2015 Other Increases Schedule

Name: GEORGE L SLOAN FOUNDATION 450029012

EIN: 34-7130472

Description	Amount
ROUNDING	2

TY 2015 Taxes Schedule**Name:** GEORGE L SLOAN FOUNDATION 450029012**EIN:** 34-7130472

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES	2	2		0
FEDERAL TAX PAYMENT - PRIOR YE	109	0		0
FOREIGN TAXES ON QUALIFIED FOR	13	13		0