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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 THE GEORGE H SCANLON FOUNDATION		A Employer identification number 42-6100764	
Number and street (or P O box number if mail is not delivered to street address) PO BOX 323		B Telephone number (see instructions) (617) 734-0446	
City or town, state or province, country, and ZIP or foreign postal code OKOBOJI, IA 51355		C If exemption application is pending, check here <input type="checkbox"/>	
G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address 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"/> E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/> F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <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			
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 3,578,547		J Accounting method <input checked="" 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	34,958	34,958		
	4 Dividends and interest from securities	93,120	93,120		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	-146,713			
	b Gross sales price for all assets on line 6a 1,270,359				
	7 Capital gain net income (from Part IV, line 2) . . .		0		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	-18,635	128,078		
	13 Compensation of officers, directors, trustees, etc	12,000	6,000		6,000
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule).	80	40		40
	b Accounting fees (attach schedule).	2,640	1,320		1,320
	c Other professional fees (attach schedule)	50,348	50,348		0
	17 Interest				
	18 Taxes (attach schedule) (see instructions) . . .	955	955		0
	19 Depreciation (attach schedule) and depletion . . .	92	0		
	20 Occupancy				
	21 Travel, conferences, and meetings.	9,604	0		9,604
	22 Printing and publications				
	23 Other expenses (attach schedule).	1,620	734		734
	24 Total operating and administrative expenses. Add lines 13 through 23	77,339	59,397		17,698
	25 Contributions, gifts, grants paid	200,030			200,030
	26 Total expenses and disbursements. Add lines 24 and 25	277,369	59,397		217,728
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-296,004			
	b Net investment income (if negative, enter -0-)		68,681		
	c Adjusted net income (if negative, enter -0-) . . .				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	67,680	448,865	448,865
	2	Savings and temporary cash investments			
	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)	2,533,079	2,168,862	2,544,951
	c	Investments—corporate bonds (attach schedule)	560,359	564,728	551,731
	11	Investments—land, buildings, and equipment basis ▶ _____			

Liabilities		Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans.			
	13	Investments—other (attach schedule)	373,182	33,000	33,000
	14	Land, buildings, and equipment basis ▶ _____ 1,592			
		Less accumulated depreciation (attach schedule) ▶ 1,592	92	0	0
	15	Other assets (describe ▶ _____)			
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	3,534,392	3,215,455	3,578,547

Net Assets or Fund Balances	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	
		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	0	0	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	

29	Retained earnings, accumulated income, endowment, or other funds	3,534,392	3,215,455	
30	Total net assets or fund balances (see instructions)	3,534,392	3,215,455	
31	Total liabilities and net assets/fund balances (see instructions)	3,534,392	3,215,455	

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year’s return)	1	3,534,392
2	Enter amount from Part I, line 27a	2	-296,004
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	3,238,388
5	Decreases not included in line 2 (itemize) ▶ _____	5	22,933
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	3,215,455

Part IV

Capital Gains and Losses for Tax on Investment Income

List and describe the kind(s) of property sold (e g , real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co)		How acquired P—Purchase (b) D—Donation	Date acquired (c) (mo , day, yr)	Date sold (d) (mo , day, yr)
1 a	PUBLICLY TRADED SECURITIES	P		
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 1,270,359		1,417,072	-146,713
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			-146,713
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	-146,713
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8 }		3	

Part V

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

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

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2014	182,220	4,067,326	0 044801
2013	185,048	3,958,621	0 046746
2012	158,155	3,942,427	0 040116
2011	246,211	4,142,675	0 059433
2010	199,264	3,828,893	0 052042

2	Total of line 1, column (d).	2	0 243138
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 048628
4	Enter the net value of noncharitable-use assets for 2015 from Part X, line 5.	4	4,050,917
5	Multiply line 4 by line 3.	5	196,988
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	687
7	Add lines 5 and 6.	7	197,675
8	Enter qualifying distributions from Part XII, line 4.	8	217,728

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 VIExcise 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

687

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

687

6

Credits/Payments

a

2015 estimated tax payments and 2014 overpayment credited to 2015

6a

3,173

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

3,173

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

10

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

10

2,486

11

Enter the amount of line 10 to be Credited to 2015 estimated tax ☒ 2,486 Refunded ☒

11

0

Part VII-AStatements 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 ☒ \$ 0 (2) On foundation managers ☒ \$ 0

e

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

2

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

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

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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 ▶ROBERT DOWNER Located at ▶122 S LINN ST IOWA CITY IA Telephone no ▶(319) 338-9222 ZIP+4 ▶52240			
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 checked="" type="checkbox"/> Yes <input 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		
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>).	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
CLARKE W SCANLON PO BOX 323 OKOBOJI,IA 51355	PRESIDENT 1 00	0	0	0
JAMES P SCANLON JR PO BOX 323 OKOBOJI,IA 51355	TREASURER 15 00	12,000	0	0
JANE A SCANLON PO BOX 323 OKOBOJI,IA 51355	SECRETARY 1 00	0	0	0
MARCIA E SCANLON PO BOX 323 OKOBOJI,IA 51355	VICE PRESIDENT 1 00	0	0	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.

0

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

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

1	
2	
3	
4	

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	3,925,989
b	Average of monthly cash balances.	1b	153,617
c	Fair market value of all other assets (see instructions).	1c	33,000
d	Total (add lines 1a, b, and c).	1d	4,112,606
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	4,112,606
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	61,689
5	Net value of noncharitable-use assets.Subtract line 4 from line 3 Enter here and on Part V, line 4	5	4,050,917
6	Minimum investment return.Enter 5% of line 5.	6	202,546

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	202,546
2a	Tax on investment income for 2015 from Part VI, line 5.	2a	687
b	Income tax for 2015 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	687
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	201,859
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	201,859
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amountas adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	201,859

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	217,728
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions.Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	217,728
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	687
6	Adjusted qualifying distributions.Subtract line 5 from line 4.	6	217,041

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				201,859
2 Undistributed income, if any, as of the end of 2015				
a Enter amount for 2014 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2015				
a From 2010.	11,793			
b From 2011.	42,871			
c From 2012.				
d From 2013.	7,361			
e From 2014.				
f Total of lines 3a through e.	62,025			
4 Qualifying distributions for 2015 from Part XII, line 4				
a Applied to 2014, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2015 distributable amount.				201,859
e Remaining amount distributed out of corpus	15,869			
5 Excess distributions carryover applied to 2015 (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	77,894			
b Prior years' undistributed income Subtract line 4b from line 2b.		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions.		0		
e Undistributed income for 2014 Subtract line 4a from line 2a Taxable amount—see instructions.			0	
f Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015.				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2010 not applied on line 5 or line 7 (see instructions).	11,793			
9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a.	66,101			
10 Analysis of line 9				
a Excess from 2011.	42,871			
b Excess from 2012.				
c Excess from 2013.	7,361			
d Excess from 2014.				
e Excess from 2015.	15,869			

Part XIV

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. . . . ▶

Check box to indicate whether the organization is a private operating foundation described in section 4942(j)(3) or 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	Tax year	Prior 3 years			(e) Total
		(a) 2015	(b) 2014	(c) 2013	(d) 2012	

• 85% of line 2a

Qualifying distributions from Part XII, line 4 for each year listed					
--	--	--	--	--	--

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				
---	---	--	--	--	--

"Assets" alternative test—enter					
---------------------------------	--	--	--	--	--

(1) Value of all assets

(2) Value of assets qualifying under section 4942(j)(3)(B)(i)

• "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . . .					
--	--	--	--	--	--

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:

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))

• 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 <i>Paid during the year</i> See Additional Data Table				
Total			3a	200,030
b <i>Approved for future payment</i> COOLIDGE CORNER THEATRE FOUNDATION 290 HARVARD ST BROOKLINE, MA 02446	NONE	PC	GENERAL OPERATING BUDGET	100,000
Total			3b	100,000

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 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				
ANIMAL PROTECTIVE ASSOCIATION DBA HARMONY HOUSE FOR CATS PO BOX 18098 CHICAGO,IL 60618	NONE	PC	GENERAL OPERATING BUDGET	5,000
ARTBARN COMMUNITY THEATER PO BOX 470504 BROOKLINE,MA 02447	NONE	PC	GENERAL OPERATING BUDGET	250
BEDELL FAMILY YMCA 1900 41ST ST SPIRIT LAKE,IA 51360	NONE	PC	GENERAL OPERATING BUDGET	500
BOSTON CHILDREN'S MUSEUM 308 CONGRESS ST BOSTON,MA 02210	NONE	PC	GENERAL OPERATING BUDGET	150
BROOKLINE ART CENTER 86 MONMOUTH ST BROOKLINE,MA 02446	NONE	PC	GENERAL OPERATING BUDGET	2,000
BROOKLINE EDUCATION FOUNDATION PO BOX 470652 BROOKLINE,MA 02447	NONE	PC	GENERAL OPERATING BUDGET	700
BROOKLINE TEEN CENTER 40 WEBSTER PL BROOKLINE,MA 02245	NONE	PC	GENERAL OPERATING BUDGET	1,000
CANINE COMPANIONS FOR INDEPENDENCE PO BOX 446 SANTA ROSA,CA 65402	NONE	PC	GENERAL OPERATING BUDGET	1,000
CHILDREN'S HOSPITAL BOSTON 300 LONGWOOD AVE BOSTON,MA 02446	NONE	PC	GENERAL OPERATING BUDGET	10,000
CHILDREN'S HOSPITAL LOS ANGELES 4650 SUNSET BLVD LOS ANGELES,CA 90027	NONE	PC	GENERAL OPERATING BUDGET	6,375
CHURCH OF OUR SAVIOUR 25 MONMOUTH ST BROOKLINE,MA 02446	NONE	PC	GENERAL OPERATING BUDGET	250
CLIMATE CHANGE ACTION BROOKLINE 20 CHAPEL STREET B-412 BROOKLINE,MA 02446	NONE	PC	GENERAL OPERATING BUDGET	101
COOLIDGE CORNER THEATRE FOUNDATION 290 HARVARD ST BROOKLINE,MA 02446	NONE	PC	GENERAL OPERATING BUDGET	12,500
DANA FARBER CANCER INSTITUTE 450 BROOKLINE AVE BOSTON,MA 02115	NONE	PC	GENERAL OPERATING BUDGET	250
DAVID LYNCH FOUNDATION FOR CONSCIOUSNESS BASED EDUCATION 1000 NORTH FOURTH FAIRFIELD,IA 52557	NONE	PC	GENERAL OPERATING BUDGET	1,000
Total			3a	200,030

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				
DOGS FOR DEAF AND DISABLED AMERICANS PO BOX 100 PRINCETON, MA 01541	NONE	PC	GENERAL OPERATING BUDGET	250
EPIPHANY SCHOOL 154 CENTRE STREET DORCHESTER, MA 02124	NONE	PC	GENERAL OPERATING BUDGET	150
INSTITUTE OF CONTEMPORARY ART 100 NORTHERN AVENUE BOSTON, MA 02210	NONE	PC	GENERAL OPERATING BUDGET	125
LAWRENCE SCHOOL PTO 27 FRANCIS ST BROOKLINE, MA 02446	NONE	PC	GENERAL OPERATING BUDGET	500
LEUKEMIA & LYMPHOMA SOCIETY 3 INTERNATIONAL DRIVE SUITE 200 RYE BROOK, NY 10573	NONE	PC	GENERAL OPERATING BUDGET	250
MEALS ON WHEELS 203 S UNION ST ALEXANDRIA, VA 22314	NONE	PC	GENERAL OPERATING BUDGET	1,000
MIDWEST LUMBER MUSEUM 1301 19TH AVE NW CLINTON, IA 52732	NONE	PC	GENERAL OPERATING BUDGET	1,375
MOTHERS OUT FRONT 30 BOW ST CAMBRIDGE, MA 02138	NONE	PC	GENERAL OPERATING BUDGET	750
MUSEUM OF FINE ARTS 465 HUNTINGTON AVENUE BOSTON, MA 02115	NONE	PC	GENERAL OPERATING BUDGET	250
NEUE GALERIE NEW YORK 1048 5TH AVE NEW YORK, NY 10028	NONE	PC	GENERAL OPERATING BUDGET	100
NEW ENGLAND AQUARIUM NEW ENGLAND AQUARIUM CENTRAL WHARF BOSTON, MA 02110	NONE	PC	GENERAL OPERATING BUDGET	199
NEW ENGLAND WHEELCHAIR SPORTS INC 20 HAVEN STREET DOVER, MA 02030	NONE	PC	GENERAL OPERATING BUDGET	650
NORTH LIBERTY LIBRARY PO BOX 320 NORTH LIBERTY, IA 52317	NONE	PC	GENERAL OPERATING BUDGET	7,000
NORTH SHORE ANIMAL LEAGUE 25 DAVIS AVENUE PORT WASHINGTON, NY 11050	NONE	PC	GENERAL OPERATING BUDGET	1,000
OCEANA INC 2501 M ST NW WASHINGTON, DC 20037	NONE	PC	GENERAL OPERATING BUDGET	25,000
Total  3a				200,030

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
OKOBOJI FOUNDATION ENDOWMENT (COMMUNITY FOUNDATION OF GREATER DES MOINES) PO BOX 593 OKOBOJI,IA 51355	NONE	PC	GENERAL OPERATING BUDGET	2,000
OPERATION WALK - WOMEN ORTHOPAEDIST GLOBAL OUTREACH 314 S SOUTH STREET MOUNT AIRY,NC 27030	NONE	PC	GENERAL OPERATING BUDGET	4,375
OPERATION WALK CHICAGO (NORTHWESTERN ARTHRITIS & REHABILITATION INSTITUTE) 680 N LAKE SHORE DR STE 900 CHICAGO,IL 60611	NONE	PC	GENERAL OPERATING BUDGET	17,000
OTIS COLLEGE OF ART AND DESIGN 9045 LINCOLN BOULEVARD LOS ANGELES,CA 90045	NONE	PC	GENERAL OPERATING BUDGET	7,500
PEOPLE FOR THE ETHICAL TREATMENT OF ANIMALS (PETA) 500 FRONT STREET NORFOLK,VA 23510	NONE	PC	GENERAL OPERATING BUDGET	2,500
PROVIDENCE CATHOLIC HIGH SCHOOL 1800 W LINCOLN HWY NEW LENOX,IL 60451	NONE	PC	GENERAL OPERATING BUDGET	15,000
PROVINCETOWN INTERNATIONAL FILM FESTIVAL PO BOX 605 PROVINCETOWN,MA 02657	NONE	PC	GENERAL OPERATING BUDGET	5,000
PUPPET SHOWPLACE THEATER 32 STATION ST BROOKLINE,MA 02445	NONE	PC	GENERAL OPERATING BUDGET	100
ROTARY INTERNATIONAL - BROOKLINE PO BOX 136 BROOKLINE,MA 02446	NONE	PC	GENERAL OPERATING BUDGET	100
SEED FOUNDATION 1776 MASSACHUSETTS AVENUE NW SUITE 600 WASHINGTON,DC 20036	NONE	PC	GENERAL OPERATING BUDGET	1,030
SERO PROJECT 455 E 51ST ST APT 2C NEW YORK,NY 10022	NONE	PC	GENERAL OPERATING BUDGET	250
SPECIAL OLYMPICS 1133 19TH ST NW WASHINGTON,DC 20036	NONE	PC	GENERAL OPERATING BUDGET	500
UNIVERSITY OF IOWA FOUNDATION PO BOX 4550 IOWA CITY,IA 52244	NONE	PC	GENERAL OPERATING BUDGET	40,000
UNIVERSITY OF IOWA LAW SCHOOL PO BOX 4550 IOWA CITY,IA 52244	NONE	PC	ENDOWMENT/SCHOLARSHIPS	25,000
Total  3a				200,030

TY 2015 Accounting Fees Schedule

Name: THE GEORGE H SCANLON FOUNDATION

EIN: 42-6100764

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	2,640	1,320		1,320

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2015 Depreciation Schedule

Name: THE GEORGE H SCANLON FOUNDATION

EIN: 42-6100764

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
COMPUTER	2010-08-20	1,592	1,500	200DB	5 0000000000000	92	0		

TY 2015 Investments Corporate Bonds Schedule**Name:** THE GEORGE H SCANLON FOUNDATION**EIN:** 42-6100764

Name of Bond	End of Year Book Value	End of Year Fair Market Value
ALCOA INC	103,970	103,635
AVON PRODUCTS INC	51,454	46,500
DUN & BRADSTREET CORP	100,326	97,886
GENERAL ELECTRIC CAPITAL CORP	0	0
MONTPELIER RE HLDGS	102,557	101,650
OWENS CORNING	101,096	100,058
TUPPERWARE BRANDS CORP	105,325	102,002

TY 2015 Investments Corporate Stock Schedule

Name: THE GEORGE H SCANLON FOUNDATION
EIN: 42-6100764

Name of Stock	End of Year Book Value	End of Year Fair Market Value
ABBVIE INC COM	130,956	157,687
APPLE INC	89,769	180,931
COMCAST CORP	100,000	102,640
CONOCOPHILLIPS	0	0
DEERE & COMPANY	137,509	120,637
DTE ENERGY HOLDING CO	29,193	140,736
GENERAL MOTORS CO COM	0	0
GOLDMAN SACHS GROUP INC DEP SHS	102,371	103,960
ISHARES FUNDS	345,291	457,503
JPMORGAN CHASE & CO DEPOSITARY SHS	25,000	25,240
MANITOWOC INC	0	0
MICROSOFT CORP	80,443	117,148
NOVARTIS AG ADR-EACH REPR	122,057	135,573
PIMCO INCOME STRATEGY FD II	213,569	164,494
ROCHE HOLDINGS AG SPN ADR EACH REP	0	0
SANOFI SPONSORED ADR	0	0
TORTOISE MLP FUND INC COM	0	0
VANGUARD FUNDS	90,846	98,428
VERIZON COMMUNICATIONS	101,658	102,178
AETNA INC NEW COM	91,844	132,144
METLIFE INC COM	83,473	75,869
LYONDELLBASELL INDUSTRIES	83,911	84,691
GILEAD SCIENCES INC	80,282	79,354
KRAFT HEINZ CO COM	81,467	92,901
AMGEN INC	97,333	98,394
MERCK & CO INC NEW COM	81,890	74,443

TY 2015 Investments - Other Schedule

Name: THE GEORGE H SCANLON FOUNDATION

EIN: 42-6100764

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
MAINGATE MLP FUND	AT COST	0	0
PRIVATELY HELD STOCK	AT COST	33,000	33,000

TY 2015 Land, Etc.
Schedule

Name: THE GEORGE H SCANLON FOUNDATION
EIN: 42-6100764

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
COMPUTER	1,592	1,592	0	

TY 2015 Legal Fees Schedule

Name: THE GEORGE H SCANLON FOUNDATION

EIN: 42-6100764

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	80	40		40

TY 2015 Other Decreases Schedule

Name: THE GEORGE H SCANLON FOUNDATION

EIN: 42-6100764

Description	Amount
NONDIVIDEND DISTRIBUTIONS	22,933

TY 2015 Other Expenses Schedule

Name: THE GEORGE H SCANLON FOUNDATION

EIN: 42-6100764

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
POSTAGE	142	0		0
OFFICE SUPPLIES	1,478	734		734

TY 2015 Other Professional Fees Schedule

Name: THE GEORGE H SCANLON FOUNDATION

EIN: 42-6100764

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT FEES	50,348	50,348		0

TY 2015 Taxes Schedule

Name: THE GEORGE H SCANLON FOUNDATION

EIN: 42-6100764

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAX	955	955		0