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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 Jim and Dede Bartlett Foundation		A Employer identification number 46-2331849	
% Foundation Source		B Telephone number (see instructions) (800) 839-1754	
Number and street (or P O box number if mail is not delivered to street address) Foundation Source 501 Silverside Rd		Room/suite	
City or town, state or province, country, and ZIP or foreign postal code Wilmington, DE 198091377		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		<input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change	
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"/> 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"/>	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ 1,654,354		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)	0			
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	502	502		
	4 Dividends and interest from securities				
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	28,961			
	b Gross sales price for all assets on line 6a 336,361				
	7 Capital gain net income (from Part IV, line 2) . . .		320,330		
	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	29,463	320,832		
	13 Compensation of officers, directors, trustees, etc	0			
	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) . . .	6,400			
	19 Depreciation (attach schedule) and depletion . .				
	20 Occupancy				
	21 Travel, conferences, and meetings.				
	22 Printing and publications				
	23 Other expenses (attach schedule).	18,175	150		18,025
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	24,575	150		18,025
	25 Contributions, gifts, grants paid	551,000			551,000
	26 Total expenses and disbursements. Add lines 24 and 25	575,575	150		569,025
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-546,112			
	b Net investment income (if negative, enter -0-)		320,682		
	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				
	2	Savings and temporary cash investments	1,780,096	1,541,384	1,541,384	
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____				
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions).				
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments—U S and state government obligations (attach schedule)				
	b	Investments—corporate stock (attach schedule)	1,528,215	1,220,815	112,970	
	c	Investments—corporate bonds (attach schedule)				
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____				
	12	Investments—mortgage loans.				
	13	Investments—other (attach schedule)				
	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)	3,308,311	2,762,199	1,654,354		
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				
	28	Paid-in or capital surplus, or land, bldg , and equipment fund				
	29	Retained earnings, accumulated income, endowment, or other funds	3,308,311	2,762,199		
	30	Total net assets or fund balances(see instructions)	3,308,311	2,762,199		
	31	Total liabilities and net assets/fund balances(see instructions)	3,308,311	2,762,199		

Part III Analysis of Changes in Net Assets or Fund Balances			
1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year’s return)	1	3,308,311
2	Enter amount from Part I, line 27a	2	-546,112
3	Other increases not included in line 2 (itemize) ▶ _____	3	
4	Add lines 1, 2, and 3	4	2,762,199
5	Decreases not included in line 2 (itemize) ▶ _____	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	2,762,199

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			
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 336,361		16,031	320,330
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			320,330
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	320,330
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	645,025	3,056,041	0 211066
2013	297,812	955,696	0 311618
2012	0	0	0 0
2011	0	0	0 0
2010	0	0	0 0

2	Total of line 1, column (d).	2	0 522684
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 261342
4	Enter the net value of noncharitable-use assets for 2015 from Part X, line 5.	4	2,054,454
5	Multiply line 4 by line 3.	5	536,915
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	3,207
7	Add lines 5 and 6.	7	540,122
8	Enter qualifying distributions from Part XII, line 4.	8	569,025

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

3

Add lines 1 and 2.

3

3,207

4

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

4

5

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

5

3,207

6

Credits/Payments

a

2015 estimated tax payments and 2014 overpayment credited to 2015

6a

6,503

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

6,503

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

3,296

11

Enter the amount of line 10 to be **Credited to 2015 estimated tax** 3,296 **Refunded**

11

Part VII-A

Statements Regarding Activities

1a

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

1a

No

b

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

1b

No

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

c

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

1c

No

d

Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:
(1) On the foundation \$ _____ (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)
 DE _____

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 ▶	13	Yes	
14	The books are in care of ▶Foundation SourceTelephone no ▶(800) 839-1754 Located at ▶501 Silverside Road Suite 123 Wilmington DEZIP+4 ▶198091377			
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		
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

No

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
Dede Bartlett	Co- Pres / Dir	0	0	0
Foundation Source 501 Silverside Rd Wilmington, DE 198091377	1 0			
James W Bartlett	Co- Pres / Dir / Sec /	0	0	0
Foundation Source 501 Silverside Rd Wilmington, DE 198091377	Treas 1 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

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

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	346,213
b	Average of monthly cash balances.	1b	1,739,527
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	2,085,740
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	2,085,740
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	31,286
5	Net value of noncharitable-use assets.Subtract line 4 from line 3 Enter here and on Part V, line 4	5	2,054,454
6	Minimum investment return.Enter 5% of line 5.	6	102,723

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	102,723
2a	Tax on investment income for 2015 from Part VI, line 5.	2a	3,207
b	Income tax for 2015 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	3,207
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	99,516
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	99,516
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amountas adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	99,516

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	569,025
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	569,025
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	3,207
6	Adjusted qualifying distributions.Subtract line 5 from line 4.	6	565,818

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				99,516
2 Undistributed income, if any, as of the end of 2015				
a Enter amount for 2014 only.				
b Total for prior years 2013 , 2012 , 2011				
3 Excess distributions carryover, if any, to 2015				
a From 2010.				
b From 2011.				
c From 2012.				
d From 2013.				281,683
e From 2014.				521,420
f Total of lines 3a through e.	803,103			
4 Qualifying distributions for 2015 from Part XII, line 4 ▶ \$ 569,025				
a Applied to 2014, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).				
d Applied to 2015 distributable amount.				99,516
e Remaining amount distributed out of corpus	469,509			
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	1,272,612			
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	1,272,612			
10 Analysis of line 9				
a Excess from 2011.				
b Excess from 2012.				
c Excess from 2013.				281,683
d Excess from 2014.				521,420
e Excess from 2015.				469,509

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 4942(j)(3) or 4942(j)(5)

☐ 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

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))

See Additional Data Table

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

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

Form **990-PF** (2015)

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			14	502		
4 Dividends and interest from securities.						
5 Net rental income or (loss) from real estate						
a Debt-financed property.						
b Not debt-financed property.						
6 Net rental income or (loss) from personal property						
7 Other investment income.						
8 Gain or (loss) from sales of assets other than inventory			18	28,961		
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).				29,463		
13 Total. Add line 12, columns (b), (d), and (e).						

[illegible]

Form 990PF Part XV Line 1a - 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).

Dede Bartlett
JAMES W BARTLETT

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				
AMERICAN UNIVERSITY CENTRAL ASIA FOUNDATION 2 FOXMOOR LEBANON,IL 62254	N/A	PC	General & Unrestricted	1,000
ARTS FOR HEALING INC 24 GROVE ST NEW CANAAN,CT 06840	N/A	PC	General & Unrestricted	5,000
BOULDER VALLEY SCHOOL DISTRICT 6600 E ARAPAHOE RD BOULDER,CO 80303	N/A	PC	BHS Millenium Lab for CubePro printers and cartridges program	9,000
B Alexander BRIGHAM YOUNG UNIVERSITY 1450 N UNIVERSITY AVE PROVO,UT 84604	NONE	I	the J Perry Bartlett Scholarship grant	5,000
C Lingelbach BROWN UNIVERSITY OF PROVIDENCE CAMPUS BOX 1911 164 ANGELL ST PROVIDENCE,RI 02912	NONE	I	the J Perry Bartlett Scholarship grant	5,000
R Friedman COLORADO SCHOOL OF MINES FND inc 1232 W CAMPUS RD GOLDEN,CO 80401	NONE	I	The J Perry Bartlett Scholarship grant	5,000
CONNECTICUT CHALLENGE INC 250 PEQUOT AVE SOUTHPORT,CT 06890	N/A	PC	Charitable Event	1,000
b long CORNELL UNIVERSITY PO BOX 752 ITHACA,NY 14851	NONE	I	The J Perry Bartlett Scholarship grant	10,000
DOMESTIC VIOLENCE CRISIS CENTER 777 SUMMER ST STE 400 STAMFORD,CT 06901	N/A	PC	Sustainability CT Program	50,000
EDUCATION FUND OF THE WOMENS FORUM INC 59 E 54TH ST STE 81 NEW YORK,NY 10022	N/A	SO I	General & Unrestricted	10,000
GETABOUT INC PO BOX 224 NEW CANAAN,CT 06840	N/A	PC	General & Unrestricted	20,000
GROOVE WITH ME INC 186 E 123RD ST 2ND FL NEW YORK,NY 10035	N/A	PC	General & Unrestricted	6,000
LEGAL MOMENTUM 5 HANOVER SQ NEW YORK,NY 10004	N/A	PC	General & Unrestricted	20,000
G Gregorich MACALESTER COLLEGE 1600 GRAND AVE SAINT PAUL,MN 55105	NONE	I	The J Perry Bartlett Scholarship grant	10,000
MEALS-ON-WHEELS OF NEW CANAAN INC PO BOX 231 NEW CANAAN,CT 06840	N/A	PC	General & Unrestricted	20,000
Total 3a				551,000

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>				
NEW CANAAN BEAUTIFICATION LEAGUE INC PO BOX 4 NEW CANAAN,CT 06840	N/A	PC	General & Unrestricted	4,000
NEW CANAAN CHAMBER CHARITABLE FOUNDATION INC 91 ELM ST NEW CANAAN,CT 06840	N/A	PC	General & Unrestricted	4,000
NEW CANAAN COMMUNITY FOUNDATION INC 111 CHERRY ST NEW CANAAN,CT 06840	N/A	PC	General & Unrestricted	45,000
NEW CANAAN COMMUNITY FOUNDATION INC 111 CHERRY ST NEW CANAAN,CT 06840	N/A	PC	Spirit of New Canaan fund	10,000
NEW CANAAN HISTORICAL SOCIETY 13 OENOKE RDG NEW CANAAN,CT 06840	N/A	PC	General & Unrestricted	1,000
NEW CANAAN LAND CONSERVATION TRUST INC PO BOX 425 NEW CANAAN,CT 06840	N/A	PC	General & Unrestricted	10,000
NEW CANAAN PRESERVATION ALLIANCE INC PO BOX 924 NEW CANAAN,CT 06840	N/A	PC	General & Unrestricted	1,000
NEW YORK UNIVERSITY 7 E 12TH ST 7TH FL New York,NY 10003	N/A	PC	ten summer research fellowships Program	40,000
L meyers NORTHEASTERN UNIVERSITY 360 HUNTINGTON AVE 250 CP BOSTON,MA 02115	NONE	I	The J Perry Bartlett Scholarship grant	5,000
PAN MASSACHUSETTS CHALLENGE TRUST 77 4TH AVE NEEDHAM HGTS,MA 02494	N/A	PC	General & Unrestricted	5,000
PERSON TO PERSON INC 1864 POST RD DARIEN,CT 06820	N/A	PC	Scholarship Fund	1,000
PLANNED PARENTHOOD OF SOUTHERN NEW ENGLAND INC 345 WHITNEY AVE NEW HAVEN,CT 06511	N/A	PC	the Stamford and Bridge office	20,000
N Dana BATES COLLEGE 2 ANDREWS RD LEWISTON,ME 04240	NONE	I	The J Perry Bartlett Scholarship grant	10,000
P Sessions UNIVERSITY OF COLORADO 1800 N GRANT ST STE 400 DENVER,CO 80203	NONE	I	The J Perry Bartlett Scholarship grant	5,000
K Vann UNIVERSITY OF COLORADO 1800 N GRANT ST STE 400 DENVER,CO 80203	NONE	I	The J Perry Bartlett Scholarship grant	10,000
Total			3a	551,000

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				
C Matous UNIVERSITY OF COLORADO 1800 N GRANT ST STE 400 DENVER,CO 80203	NONE	I	The J Perry Bartlett Scholarship grant	10,000
b peck UNIVERSITY OF COLORADO 1800 N GRANT ST STE 400 DENVER,CO 80203	NONE	I	The J Perry Bartlett Scholarship grant	10,000
d DAVis UNIVERSITY OF COLORADO 1800 N GRANT ST STE 400 DENVER,CO 80203	NONE	I	The J Perry Bartlett Scholarship grant	10,000
b Herman UNIVERSITY OF COLORADO 1800 N GRANT ST STE 400 DENVER,CO 80203	NONE	I	The J Perry Bartlett Scholarship grant	5,000
w nelson UNIVERSITY OF COLORADO 1800 N GRANT ST STE 400 DENVER,CO 80203	NONE	I	The J Perry Bartlett Scholarship grant	5,000
SPENCE SCHOOL 22 E 91ST ST NEWYORK,NY 10128	N/A	PC	Teacher compensation fund	3,000
R Kraus STANFORD UNIVERSITY 326 GALVEZ ST STANFORD,CA 94305	NONE	I	The J Perry Bartlett Scholarship grant	10,000
STAYING PUT IN NEW CANAAN INC PO BOX 484 NEW CANAAN,CT 06840	N/A	PC	General & Unrestricted	20,000
SUMMER THEATRE OF NEW CANAAN INC 70 PINE ST NEW CANAAN,CT 06840	N/A	PC	Educational Program Scholarships	10,000
j mundinger SWARTHMORE COLLEGE 500 COLLEGE AVE PEARSON 015 SWARTHMORE,PA 19081	NONE	I	The J Perry Bartlett Scholarship grant	10,000
C Rivard PURDUE UNIVERSITY 403 W WOOD ST WEST LAFAYETTE,IN 47907	NONE	I	The J Perry Bartlett Scholarship grant	10,000
G Leifer TULANE UNIVERSITY PO BOX 61075 NEW ORLEANS,LA 70161	NONE	I	The J Perry Bartlett Scholarship grant	5,000
S Guegan UNIVERSITY OF PUGET SOUND 1500 N WARNER ST STOP 1075 TACOMA,WA 98416	NONE	I	The J Perry Bartlett Scholarship grant	5,000
i soehn UNIVERSITY OF SOUTHERN CALIFORNIA 3551 TROUSDALE PKWY ADM 160 LOS ANGELES,CA 90089	NONE	I	The J Perry Bartlett Scholarship grant	10,000
J Burkhardt UNIVERSITY OF SOUTHERN CALIFORNIA 3551 TROUSDALE PKWY ADM 160 LOS ANGELES,CA 90089	NONE	I	The J Perry Bartlett Scholarship grant	10,000
Total				551,000

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>				
US FOUNDATION FOR THE INSPIRATION & RECOGNITION SC 200 BEDFORD ST MANCHESTER,NH 03101	N/A	PC	Charitable Event	4,000
VASSAR COLLEGE 124 RAYMOND AVE BOX 725 POUGHKEEPSIE,NY 12604	N/A	PC	General & Unrestricted	5,000
VASSAR COLLEGE 124 RAYMOND AVE BOX 725 POUGHKEEPSIE,NY 12604	N/A	PC	STEM Internship Program	4,000
VASSAR COLLEGE 124 RAYMOND AVE BOX 725 POUGHKEEPSIE,NY 12604	N/A	PC	STEM Internships Program	20,000
VOICES OF SEPTEMBER 11 INC 161 CHERRY ST NEWCANAAN,CT 06840	N/A	PC	General & Unrestricted	6,000
VOICES OF SEPTEMBER 11 INC 161 CHERRY ST NEWCANAAN,CT 06840	N/A	PC	Charitable Event	5,000
WAVENY CARE CENTER INC 3 FARM RD NEWCANAAN,CT 06840	N/A	PC	General & Unrestricted	20,000
WAVENY CARE CENTER INC 3 FARM RD NEWCANAAN,CT 06840	N/A	PC	financial assistance Program	5,000
WOODROW WILSON NATIONAL FELLOWSHIP FOUNDATION PO BOX 5281 PRINCETON,NJ 08543	N/A	PC	General & Unrestricted	1,000
Total.			3a	551,000

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

TY 2015 Depreciation Schedule

Name: Jim and Dede Bartlett Foundation

EIN: 46-2331849

TY 2015 Investments Corporate Stock Schedule

Name: Jim and Dede Bartlett Foundation

EIN: 46-2331849

Name of Stock	End of Year Book Value	End of Year Fair Market Value
3-D SYSTEMS CORP. DEL	1,220,815	112,970

TY 2015 Other Expenses Schedule

Name: Jim and Dede Bartlett Foundation

EIN: 46-2331849

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Administrative Fees	17,000			17,000
Bank Charges	150	150		
IRS APPLICATION FEES	1,000			1,000
State or Local Filing Fees	25			25

TY 2015 Taxes Schedule

Name: Jim and Dede Bartlett Foundation

EIN: 46-2331849

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
990-PF Estimated Tax for 2015	6,400			