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

2015

Open to Public Inspection

For calendar year 2015, or tax year beginning **, 2015, and ending**THE CRITZ FAMILY FOUNDATION, INC.  
P.O. BOX 10775  
SAVANNAH, GA 31412

**G** Check all that apply:  Initial return  Initial return of a former public charity  
 Final return  Amended return  
 Address change  Name change

**H** Check type of organization:  Section 501(c)(3) exempt private foundation  
 Section 4947(a)(1) nonexempt charitable trust  Other taxable private foundation

**I** Fair market value of all assets at end of year **(from Part II, column (c), line 16)** **J** Accounting method:  Cash  Accrual  
 Other (specify) **(Part I, column (d) must be on cash basis)**

► \$ 747,394.

<b>Part I</b> Analysis of Revenue and Expenses <small>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))</small>		<b>(a)</b> Revenue and expenses per books	<b>(b)</b> Net investment income	<b>(c)</b> Adjusted net income	<b>(d)</b> Disbursements for charitable purposes (cash basis only)
<b>REVENUE</b>	1 Contributions, gifts, grants, etc, received (attach schedule)	326,888.			
	2 Ck ► <input 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	9,466.	9,466.		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	-2,741.			
	b Gross sales price for all assets on line 6a	6,005.			
	7 Capital gain net income (from Part IV, line 2)		0.		
	8 Net short-term capital gain			0.	
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less Cost of goods sold					
c Gross profit or (loss) (attach schedule)					
11 Other income (attach schedule)					
12 Total. Add lines 1 through 11	333,613.	9,466.	0.		
<b>ADMINISTRATIVE EXPENSES</b>	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 sch) SEE ST 2	1,575.			1,575.
	c Other prof fees (attach sch)				
	17 Interest				
	18 Taxes (attach schedule)(see instrs)				
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)				
	24 Total operating and administrative expenses. Add lines 13 through 23	1,575.			1,575.
25 Contributions, gifts, grants paid	30,000.			30,000.	
26 Total expenses and disbursements. Add lines 24 and 25	31,575.	0.	0.	31,575.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	302,038.				
b Net investment income (if negative, enter -0-)		9,466.			
c Adjusted net income (if negative, enter -0-)			0.		

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Part II	Balance Sheets	Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
A S S E T S	1 Cash – non-interest-bearing		77,177.	91,072.	91,072.
	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 sch)	►			
	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)	STATEMENT 3	396,175.	659,318.	656,322.
	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)		473,352.	750,390.	747,394.
L I A B I L I T I E S	17 Accounts payable and accrued expenses				
	18 Grants payable		25,000.		
	19 Deferred revenue				
	20 Loans from officers, directors, trustees, & other disqualified persons				
	21 Mortgages and other notes payable (attach schedule)				
	22 Other liabilities (describe ►)				
	23 Total liabilities (add lines 17 through 22)		25,000.	0.	
N F E U T N D A S B S A E L T S N C O R E S S	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.	►	<input type="checkbox"/>		
	24 Unrestricted				
	25 Temporarily restricted				
	26 Permanently restricted				
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.	►	<input checked="" type="checkbox"/>		
	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		448,352.	750,390.	
	30 Total net assets or fund balances (see instructions)		448,352.	750,390.	
	31 Total liabilities and net assets/fund balances (see instructions)		473,352.	750,390.	

## 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	448,352.
2 Enter amount from Part I, line 27a	2	302,038.
3 Other increases not included in line 2 (itemize) ►	3	
4 Add lines 1, 2, and 3	4	750,390.
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	750,390.

**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shares MLC Company)		(b) How acquired P — Purchase D — Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)	
1a 460 ENERGY TRANSFER EQUITY		D	11/23/15	12/07/15	
b					
c					
d					
e					
(e) Gross sales price		(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a	6,005.		8,746.	-2,741.	
b					
c					
d					
e					
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69					
(i) FMV as of 12/31/69		(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h)) gain minus col. (k), but not less than -0- or Losses (from col. (h))	
a				-2,741.	
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	-2,741.
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):			3	-2,741.
	If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8				

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

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income )

If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?  Yes  No

If 'Yes,' the foundation does not qualify under section 4940(e). Do not complete this part.

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2014	25,000.	186,716.	0.133893
2013			
2012			
2011			
2010			
<b>2</b> Total of line 1, column (d)			0.133893
<b>3</b> 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			0.133893
<b>4</b> Enter the net value of noncharitable-use assets for 2015 from Part X, line 5			509,084.
<b>5</b> Multiply line 4 by line 3			68,163.
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)			95.
<b>7</b> Add lines 5 and 6			68,258.
<b>8</b> Enter qualifying distributions from Part XII, line 4			31,575.

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

**Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 – see instructions)**

1 a	Exempt operating foundations described in section 4940(d)(2), check here ► <input type="checkbox"/> and enter 'N/A' on line 1	
Date of ruling or determination letter: <b>(attach copy of letter if necessary – see instrs)</b>		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here. ► <input type="checkbox"/> and enter 1% of Part I, line 27b	1 189.
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	3 189.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4 0.
5	<b>Tax based on investment income.</b> Subtract line 4 from line 3 If zero or less, enter -0-	5 189.
6 Credits/Payments:		
a	2015 estimated tax pmts 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 275.
d	Backup withholding erroneously withheld	6d
7	Total credits and payments Add lines 6a through 6d	7 275.
8	Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input type="checkbox"/> 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 0.
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10 86.
11	Enter the amount of line 10 to be Credited to 2016 estimated tax ►	86. Refunded ► 11 0.

**Part VII-A Statements Regarding Activities**

1 a 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?

	Yes	No
1 a		X

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

1 b		X

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

1 c		X

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

d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:

1 d		

(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.

1 e		

2 Has the foundation engaged in any activities that have not previously been reported to the IRS?

2		X

If 'Yes,' attach a detailed description of the activities

2 a		

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

2 b		

4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?

2 c		

b If 'Yes,' has it filed a tax return on **Form 990-T** for this year?

2 d		

5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?

2 e		

If 'Yes,' attach the statement required by General Instruction T.

2 f		

6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:

2 g		

• By language in the governing instrument, or

2 h		

• 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?

2 i		

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

2 j		

8 a Enter the states to which the foundation reports or with which it is registered (see instructions) ►

2 k		

GA

2 l		

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

2 m		

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

2 n		

10 Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names and addresses

2 o		

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**Part VII-A Statements Regarding Activities (continued)**

11	X
12	X
13	X
Website address	► N/A
14	Telephone no. ► 912-447-0019
Located at ► 211 CHARLTON ST. SAVANNAH GA	ZIP + 4 ► 31401
15	N/A ► <input type="checkbox"/>
16	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
See the instructions for exceptions and filing requirements for FinCEN Form 114. If 'Yes,' enter the name of the foreign country ►	

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

File Form 4720 if any item is checked in the 'Yes' column, unless an exception applies.

	Yes	No
1 a 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)?	1 b	N/A
Organizations relying on a current notice regarding disaster assistance check here ► <input type="checkbox"/>		
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?	1 c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015?	<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.)	2 b	N/A
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ► 20 __ , 20 __ , 20 __ , 20 __		
3 a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b If 'Yes,' did it have excess business holdings in 2015 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015)	3 b	N/A
4 a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4 a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2015?	4 b	X

**Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)****5a** During the year did the foundation pay or incur any amount to

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?

(3) Provide a grant to an individual for travel, study, or other similar purposes?

(4) Provide a grant to an organization other than a charitable, etc, organization described in section 4945(d)(4)(A)? (see instructions)

(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

Yes  No

Yes  No

Yes  No

Yes  No

**b** If any answer is 'Yes' to 5a(1)-(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

Organizations relying on a current notice regarding disaster assistance check here ►

**c** If the answer is 'Yes' to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

If 'Yes,' attach the statement required by Regulations section 53.4945-5(d).

N/A  Yes  No

**6a** Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

Yes  No

**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

If 'Yes' to 6b, file Form 8870.

Yes  No

**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?

N/A  Yes  No

**5b** **N/A**

**6b** **X**

**7b** **N/A**

**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors****1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).**

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 4				
-----		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	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
-----				
-----				
-----				
-----				
-----				
-----				
-----				

Total number of other employees paid over \$50,000

►

0

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

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
<b>Total number of others receiving over \$50,000 for professional services</b>		►
		0

**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	<u>SEE PART XV, LINE 3A</u>	
2		30,000.
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	N/A	
2		
All other program-related investments. See instructions		
3		
<b>Total. Add lines 1 through 3</b>		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

b Average of monthly cash balances

c Fair market value of all other assets (see instructions)

d **Total** (add lines 1a, b, and c)

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

3 Subtract line 2 from line 1d

4 Cash deemed held for charitable activities. Enter 1-1/2% of line 3  
(for greater amount, see instructions)

5 **Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4

6 **Minimum investment return.** Enter 5% of line 5

1a	441,343.
1b	75,494.
1c	
1d	516,837.
2	
3	516,837.
4	7,753.
5	509,084.
6	25,454.

**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 | 25,454.

2a Tax on investment income for 2015 from Part VI, line 5

2a | 189.

b Income tax for 2015. (This does not include the tax from Part VI)

2b |

c Add lines 2a and 2b

2c | 189.

3 Distributable amount before adjustments Subtract line 2c from line 1

3 | 25,265.

4 Recoveries of amounts treated as qualifying distributions

4 |

5 Add lines 3 and 4

5 | 25,265.

6 Deduction from distributable amount (see instructions)

6 |

7 **Distributable amount as adjusted** Subtract line 6 from line 5 Enter here and on Part XIII, line 1

7 | 25,265.

**Part XII Qualifying Distributions** (see instructions)

1 Amounts paid (including administrative expenses) to accomplish charitable, etc, purposes

1a | 31,575.

a Expenses, contributions, gifts, etc — total from Part I, column (d), line 26

1b |

b Program-related investments — total from Part IX-B

2 |

2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc, purposes

3 |

3 Amounts set aside for specific charitable projects that satisfy the:

3a |

a Suitability test (prior IRS approval required)

3b |

b Cash distribution test (attach the required schedule)

4 | 31,575.

4 **Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4

5 |

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)

6 | 31,575.

6 **Adjusted qualifying distributions.** Subtract line 5 from line 4

**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				25,265.
2 Undistributed income, if any, as of the end of 2015			0.	
a Enter amount for 2014 only		0.		
b Total for prior years 20 20 20				
3 Excess distributions carryover, if any, to 2015				
a From 2010				
b From 2011				
c From 2012				
d From 2013				
e From 2014				
f Total of lines 3a through e	17,268.	17,268.		
4 Qualifying distributions for 2015 from Part XII, line 4 ► \$ 31,575.			0.	
a Applied to 2014, but not more than line 2a				
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				25,265.
e Remaining amount distributed out of corpus	6,310.			0.
5 Excess distributions carryover applied to 2015 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	23,578.			
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 2015 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2016				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required – see instructions)	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	23,578.			
10 Analysis of line 9				
a Excess from 2011				
b Excess from 2012				
c Excess from 2013				
d Excess from 2014	17,268.			
e Excess from 2015	6,310.			

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**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)				
<i>a Paid during the year</i>				
UNITED WAY 428 BULL STREET SAVANNAH GA 31401	N/A	T/E	SOCIAL SERVICES	30,000.
<b>Total</b>			► 3a	30,000.
<i>b Approved for future payment</i>				
<b>Total</b>			► 3b	

## Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

	Unrelated business income		(d) Amount	(e) Related or exempt function income (See instructions.)
	(a) Business code	(b) Amount		
1 Program service revenue.				
a				
b				
c				
d				
e				
f				
g Fees and contracts from government agencies				
2 Membership dues and assessments				
3 Interest on savings and temporary cash investments				
4 Dividends and interest from securities			14	9,466.
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	-2,741.
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)				6,725.
13 Total. Add line 12, columns (b), (d), and (e)			13	6,725.
(See worksheet in line 13 instructions to verify calculations.)				

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions )
N/A	

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

	Yes	No
1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		
a Transfers from the reporting foundation to a noncharitable exempt organization of.		
(1) Cash	1 a (1)	X
(2) Other assets	1 a (2)	X
b Other transactions:		
(1) Sales of assets to a noncharitable exempt organization	1 b (1)	X
(2) Purchases of assets from a noncharitable exempt organization	1 b (2)	X
(3) Rental of facilities, equipment, or other assets	1 b (3)	X
(4) Reimbursement arrangements	1 b (4)	X
(5) Loans or loan guarantees	1 b (5)	X
(6) Performance of services or membership or fundraising solicitations	1 b (6)	X
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1 c	X

**d** If the answer to any of the above is 'Yes,' complete the following schedule. Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received.

<b>(a) Line no.</b>	<b>(b) Amount involved</b>	<b>(c) Name of noncharitable exempt organization</b>	<b>(d) Description of transfers, transactions, and sharing arrangements</b>
N/A			

**2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?

Yes  No

**b** If 'Yes,' complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge

Sign  
Here

Shane Colquhoun, 3-8-17- ► CHAIRMAN

May the IRS discuss this return with the preparer shown below (see instructions)?

---

**Signature of officer or trustee**

Date

Title

---

**Title**

Paid  
Prep  
Use

Print/Type preparer's name	Preparer's signature	Date	Check <input type="checkbox"/> if self-employed	PTIN
FRANK A. SLOTIN, CPA	<i>Frank A. Slotin</i>	2/27/17		P00070631
Firm's name	► KRT CPAS PC		Firm's EIN ► 58-1202894	
Firm's address	► 6600 ABERCORN STREET SUITE 200 SAVANNAH, GA 31405		Phone no (912) 232-0475	

**BAA**

**Schedule B**  
(Form 990, 990-EZ,  
or 990-PF)

Department of the Treasury  
Internal Revenue Service

OMB No. 1545-0047

**Schedule of Contributors**

► Attach to Form 990, Form 990-EZ, or Form 990-PF.  
► Information about Schedule B (Form 990, 990-EZ, 990-PF) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

**2015**

Name of the organization

**THE CRITZ FAMILY FOUNDATION, INC.**

Employer identification number

**46-4751621**

Organization type (check one)

Filers of:

Form 990 or 990-EZ

Section:

501(c)( ) (enter number) organization  
 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation  
 527 political organization

Form 990-PF

501(c)(3) exempt private foundation

4947(a)(1) nonexempt charitable trust treated as a private foundation  
 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

**Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions

**General Rule**

For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

**Special Rules**

For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33-1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II

For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III

For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year ► \$ \_\_\_\_\_

**Caution.** An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer 'No' on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

BAA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF.

Schedule B (Form 990, 990-EZ, or 990-PF) (2015)

Name of organization

THE CRITZ FAMILY FOUNDATION, INC.

Employer identification number

46-4751621

**Part I** **Contributors** (see instructions) Use duplicate copies of Part I if additional space is needed

(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	DALE C. & LILA W. CRITZ P.O. BOX 10775 SAVANNAH, GA 31412	\$ 246,888.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions )
2	LILA CAY CRITZ 307 N. SAINTE ASAPH STREET ALEXANDRIA, VA 22314	\$ 25,000.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions )
3	CRITZ TYBEE RUN, INC. P.O. BOX 22999 SAVANNAH, GA 31403	\$ 55,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
-----	-----	\$ -----	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
-----	-----	\$ -----	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
-----	-----	\$ -----	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )

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**Name of organization**

**Employer identification number**

THE CRITZ FAMILY FOUNDATION, INC.

46-4751621

**Part II Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	VARIOUS COMMON STOCKS	\$ 246,888	VARIOUS
2	VARIOUS COMMON STOCKS	\$ 25,000	VARIOUS
3		\$	
4	Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
5		\$	
6	Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
7		\$	
8	Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
9		\$	

**BAA**

**Schedule B (Form 990, 990-EZ, or 990-PF) (2015)**

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**Name of organization**

THE CRITZ FAMILY FOUNDATION, INC.

**Employer identification number**

Employer Identification  
46-4751621

**Part III** **Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor.** Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively religious, charitable, etc., contributions of \$1,000 or less* for the year. (Enter this information once. See instructions) ► \$ \_\_\_\_\_ N/A  
Use duplicate copies of Part III if additional space is needed.

**STATEMENT 1**  
**FORM 990-PF**  
**EXPLANATION OF AMENDED RETURN**

CONTRIBUTION OF SECURITIES WAS REPORTED AT THEIR ORIGINAL COST BASIS OF \$148,940 ON THE 990-PF (ALTHOUGH CORRECTLY REPORTED ON THE SCHEDULE B AT \$246,888) AND NOT THE FMV AT DATE OF CONTRIBUTION. INVESTMENTS WERE UNDERSTATED BY \$97,948. ALSO, THE SECURITY SALE DID NOT USE THE DONATED VALUE OF \$8,746 FOR BASIS BUT INSTEAD USED THE ORIGINAL COST BASIS OF \$1,735. GAIN WAS OVERSTATED BY \$7,011.

**STATEMENT 2**  
**FORM 990-PF, PART I, LINE 16B**  
**ACCOUNTING FEES**

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TAX AND ACCOUNTING FEES	\$ 1,575.			\$ 1,575.
TOTAL	<u>\$ 1,575.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>	<u>\$ 1,575.</u>

**STATEMENT 3**  
**FORM 990-PF, PART II, LINE 10B**  
**INVESTMENTS - CORPORATE STOCKS**

CORPORATE STOCKS	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
ABBVIE INC - 200 SHARES	COST	\$ 13,388.	\$ 11,848.
ALTRIA GROUP INC - 600 SHARES	COST	28,033.	34,926.
AMERICAN EXPRESS CO - 150 SHARES	COST	14,158.	10,433.
BARD C R INC	COST	11,068.	14,208.
BERKSHIRE HATHAWAY INC - 125 SHARES	COST	15,929.	16,505.
COCA COLA COMPANY - 100 SHARES	COST	4,115.	4,296.
COMCAST CORP CL A -200 SHARES	COST	10,034.	11,286.
CONOCOPHILLIPS - 100 SHARES	COST	7,868.	4,669.
DANAHER CORP - 200 SHARES	COST	16,214.	18,576.
DIAGEO PLC NEW - 50 SHARES	COST	6,296.	5,454.
WALT DISNEY CO - 300 SHARES	COST	26,617.	31,524.
EXXON MOBIL CORP - 340 SHARES	COST	32,391.	26,503.
GENERAL ELECTRIC CO - 1200 SHARES	COST	30,570.	37,380.
ALPHABET INC (GOOGLE) - 10 SHARES	COST	5,330.	7,589.
HOME DEPOT INC - 100 SHARES	COST	7,728.	13,225.
HONEYWELL INTL INC - 100 SHARES	COST	9,446.	10,357.
INTL BUSINESS MACHINES CORP - 400 SHARES	COST	65,233.	55,048.
JOHNSON & JOHNSON - 100 SHARES	COST	10,088.	10,272.
MATTEL INC - 130 SHARES	COST	3,991.	3,532.
MICROSOFT CORP - 300 SHARES	COST	12,117.	16,644.
PROCTOR & GAMBLE CO - 50 SHARES	COST	4,082.	3,971.
SCHLUMBERGER LTD - 100 SHARES	COST	10,031.	6,975.
SYSCO CORP - 100 SHARES	COST	3,690.	4,100.
TJX COMPANIES INC - 100 SHARES	COST	5,915.	7,091.
UNION PACIFIC CORP - 200 SHARES	COST	21,689.	15,640.
VARIAN MEDICAL SYSTEMS INC - 100 SHARES	COST	8,284.	8,080.
WAL-MART STORES INC - 150 SHARES	COST	11,870.	9,195.
AIRGAS INC - 150 SHARES	COST	20,788.	20,748.
ALLERGAN PLC - 85 SHARES	COST	25,646.	26,563.
ALPHABET INC (GOOGLE) CL. A - 36 SHARES	COST	27,961.	28,008.

THE CRITZ FAMILY FOUNDATION, INC.

46-4751621

**STATEMENT 3 (CONTINUED)**  
**FORM 990-PF, PART II, LINE 10B**  
**INVESTMENTS - CORPORATE STOCKS**

<u>CORPORATE STOCKS</u>	<u>VALUATION METHOD</u>	<u>BOOK VALUE</u>	<u>FAIR MARKET VALUE</u>
ALPHABET INC (GOOGLE) CL. C - 36 SHARES	COST	\$ 27,215.	\$ 27,320.
APPLE INC - 278 SHARES	COST	32,735.	29,262.
CALBEE INC ORD - 400 SHARES	COST	16,256.	17,052.
CORELOGIC INC - 250 SHARES	COST	9,230.	8,465.
KENNEDY WILSON HLDGS - 465 SHARES	COST	11,955.	11,197.
POST HOLDINGS INC - 647 SHARES	COST	40,108.	39,920.
RPM INTERNATIONAL - 240 SHARES	COST	11,172.	10,574.
TENCENT HLDGS NEW ORD - 800 SHARES	COST	16,051.	15,742.
WALT DISNEY CO - 110 SHARES	COST	13,136.	11,559.
XYLEM INC - 290 SHARES	COST	10,890.	10,585.
	<b>TOTAL</b>	<b>\$ 659,318.</b>	<b>\$ 656,322.</b>

**STATEMENT 4**  
**FORM 990-PF, PART VIII, LINE 1**  
**LIST OF OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES**

<u>NAME AND ADDRESS</u>	<u>TITLE AND AVERAGE HOURS PER WEEK DEVOTED</u>	<u>COMPEN- SATION</u>	<u>CONTRI- BUTION TO EBP &amp; DC</u>	<u>EXPENSE ACCOUNT/ OTHER</u>
DALE C. CRITZ, SR. P.O. BOX 10775 SAVANNAH, GA 31412	CHAIRMAN 1.00	\$ 0.	\$ 0.	\$ 0.
DALE C. CRITZ, JR. P.O. BOX 10775 SAVANNAH, GA 31412	VICE-CHAIRMAN 1.00	0.	0.	0.
LILA W. CRITZ P.O. BOX 10775 SAVANNAH, GA 31412	TRUSTEE 1.00	0.	0.	0.
DEBRA L. CRITZ P.O. BOX 10775 SAVANNAH, GA 31412	TRUSTEE 0	0.	0.	0.
L. CAY CRITZ P.O. BOX 10775 SAVANNAH, GA 31412	TRUSTEE 0	0.	0.	0.
CATHY CRAWFORD BAXTER P.O. BOX 10775 SAVANNAH, GA 31412	SECRETARY 0	0.	0.	0.
VALERIE GEORGEVITCH 1367 WACCAMAW SHORES ROAD LAKE WACCAMAW, NC 28450	TREASURER 0	0.	0.	0.
	<b>TOTAL</b>	<b>\$ 0.</b>	<b>\$ 0.</b>	<b>\$ 0.</b>

2015

**FEDERAL STATEMENTS**

**PAGE 3**

**THE CRITZ FAMILY FOUNDATION, INC.**

**46-4751621**

**STATEMENT 5  
FORM 990-PF, PART XV, LINE 1A  
FOUNDATION MANAGERS - 2% OR MORE CONTRIBUTORS**

DALE C. CRITZ, SR.  
LILA W. CRITZ