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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 WEST END HOME FOUNDATION		A Employer identification number 62-0516508	
Number and street (or P O box number if mail is not delivered to street address) 109 KENNER AVE SUITE 202		B Telephone number (see instructions) (615) 383-1395	
City or town, state or province, country, and ZIP or foreign postal code NASHVILLE, TN 37205		C If exemption application is pending, check here ▶ ☐	
G Check all that apply ☐ Initial return ☐ Final return ☐ Address change		D 1. Foreign organizations, check here ▶ ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ 40,342,220		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐	
J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)			

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		Revenue and expenses per (a) books	Net investment (b) income	Adjusted net (c) income	Disbursements for charitable purposes (d) (cash basis only)
Revenue	1	Contributions, gifts, grants, etc , received (attach schedule)	600		
	2	Check ▶ ☒ if the foundation is not required to attach Sch B			
	3	Interest on savings and temporary cash investments			
	4	Dividends and interest from securities	867,990	867,990	867,990
	5a	Gross rents			
	b	Net rental income or (loss) _____			
	6a	Net gain or (loss) from sale of assets not on line 10  4,037,526			
	b	Gross sales price for all assets on line 6a 40,010,927			
	7	Capital gain net income (from Part IV, line 2) . . .	4,037,526		
	8	Net short-term capital gain		5,636	
	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)	 111,231	111,231	111,231
	12	Total.Add lines 1 through 11	5,017,347	5,016,747	984,857
	13	Compensation of officers, directors, trustees, etc			
	14	Other employee salaries and wages	89,877		89,877
	15	Pension plans, employee benefits			
	16a	Legal fees (attach schedule).	 37,511		37,511
	b	Accounting fees (attach schedule).	 42,065	12,450	29,615
	c	Other professional fees (attach schedule)	 154,007	133,598	133,598
	17	Interest			
	18	Taxes (attach schedule) (see instructions) . . .	 40,000		
	19	Depreciation (attach schedule) and depletion . . .	 882		
	20	Occupancy	25,840		25,840
	21	Travel, conferences, and meetings.			
	22	Printing and publications			
	23	Other expenses (attach schedule).	 29,673		29,673
	24	Total operating and administrative expenses. Add lines 13 through 23	419,855	146,048	133,598
	25	Contributions, gifts, grants paid	1,755,783		1,755,783
	26	Total expenses and disbursements.Add lines 24 and 25	2,175,638	146,048	133,598
	27	Subtract line 26 from line 12			
	a	Excess of revenue over expenses and disbursements	2,841,709		
	b	Net investment income (if negative, enter -0-)		4,870,699	
	c	Adjusted net income(if negative, enter -0-) . . .		851,259	

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	2,641,418	71,567	71,567	
	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) ▶ _____ 375,760				
		Less allowance for doubtful accounts ▶ _____		375,760	375,760	
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments—U S and state government obligations (attach schedule)	31,979,137	39,894,893	39,894,893	
	b	Investments—corporate stock (attach schedule)				
	c	Investments—corporate bonds (attach schedule)	7,545,653			
	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 ▶ _____ 32,806					
	Less accumulated depreciation (attach schedule) ▶ _____ 28,321	5,353	4,485			
15	Other assets (describe ▶ _____)					
16	Total assets(to be completed by all filers—see the instructions Also, see page 1, item I)	42,171,561	40,346,705	40,342,220		
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 ▶ ☒ and complete lines 24 through 26 and lines 30 and 31.					
	24	Unrestricted	41,444,136	39,630,099		
	25	Temporarily restricted	617,425	606,606		
	26	Permanently restricted	110,000	110,000		
	Foundations that do not follow SFAS 117, check here ▶ ☐ and complete lines 27 through 31.					
	27	Capital stock, trust principal, or current funds				
	28	Paid-in or capital surplus, or land, bldg , and equipment fund				
	29	Retained earnings, accumulated income, endowment, or other funds				
	30	Total net assets or fund balances(see instructions)	42,171,561	40,346,705		
	31	Total liabilities and net assets/fund balances(see instructions)	42,171,561	40,346,705		

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	42,171,561		
2	Enter amount from Part I, line 27a	2	2,841,709		
3	Other increases not included in line 2 (itemize) ▶ _____	3	-4,666,565		
4	Add lines 1, 2, and 3	4	40,346,705		
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	40,346,705		

Part IV

Capital Gains and Losses for Tax on Investment Income

List and describe the kind(s) of property sold (e g , real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co)		How acquired P—Purchase (b) D—Donation	Date acquired (c) (mo , day, yr)	Date sold (d) (mo , day, yr)
1a	See Additional Data Table			
b				
c				
d				
e				

(e) Gross sales price	Depreciation allowed (f) (or allowable)	Cost or other basis (g) plus expense of sale	Gain or (loss) (h) (e) plus (f) minus (g)
a See Additional Data Table			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			Gains (Col (h) gain minus col (k), but not less than -0-) or (l) Losses (from col (h))
(i) F M V as of 12/31/69	Adjusted basis (j) as of 12/31/69	Excess of col (i) (k) over col (j), if any	
a See Additional Data Table			
b			
c			
d			
e			

2	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	4,037,526
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	5,636

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	2,300,609	42,259,981	0 054439
2013	1,368,863	41,088,444	0 033315
2012	692,623	36,613,664	0 018917
2011	494,099	33,212,904	0 014877
2010	1,014,257	29,742,123	0 034102

2	Total of line 1, column (d).	2	0 155650
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 031130
4	Enter the net value of noncharitable-use assets for 2015 from Part X, line 5.	4	40,417,860
5	Multiply line 4 by line 3.	5	1,258,208
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	48,707
7	Add lines 5 and 6.	7	1,306,915
8	Enter qualifying distributions from Part XII, line 4.	8	1,988,708

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

48,707

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

48,707

6

Credits/Payments

a

2015 estimated tax payments and 2014 overpayment credited to 2015

6a

79,465

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

79,465

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

30,758

11

Enter the amount of line 10 to be Credited to 2015 estimated tax ☒ 30,758 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)?
If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.

1b

No

c

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

1c

No

d

Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:
(1) On the foundation ☒ \$ _____ (2) On foundation managers ☒ \$ _____

e

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

2

Has the foundation engaged in any activities that have not previously been reported to the IRS?
If "Yes," attach a detailed description of the activities.

2

No

3

Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes.

3

No

4a

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

4a

No

b

If "Yes," has it filed a tax return on Form 990-T for this year?

4b

5

Was there a liquidation, termination, dissolution, or substantial contraction during the year?
If "Yes," attach the statement required by General Instruction T.

5

No

6

Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:
• By language in the governing instrument, or
• By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?

6

Yes

7

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

7

Yes

8a

Enter the states to which the foundation reports or with which it is registered (see instructions):
☒ TN

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 ▶WESTENDHOMEFOUNDATION.ORG	13	Yes	
14	The books are in care of ▶CAROLINE SHOCKLEY Located at ▶109 KENNER AVENUE SUITE 202 NASHVILLE TN Telephone no ▶(615) 383-1395 ZIP+4 ▶37205			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here ▶ ☐ 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? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ 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)? ☐ Yes ☒ 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). ☐ Yes ☒ 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)? ☐ Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐	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? ☐	1c		
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? ☐ Yes ☒ 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? ☐ Yes ☒ 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
See Additional Data Table				

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.

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Part VIII

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

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services.		

Part IX-A

Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1 THE WEST END HOME FOUNDATION FUNCTIONS AS A GRANT- MAKING FOUNDATION BY GRANTING MONIES TO NONPROFIT ORGANIZATIONS TO CARRY OUT CHARITABLE CAUSES	1,988,708
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 N/A	
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	40,018,735
b	Average of monthly cash balances.	1b	1,014,625
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	41,033,360
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	
3	Subtract line 2 from line 1d.	3	41,033,360
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	615,500
5	Net value of noncharitable-use assets.Subtract line 4 from line 3 Enter here and on Part V, line 4	5	40,417,860
6	Minimum investment return.Enter 5% of line 5.	6	2,020,893

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	2,020,893
2a	Tax on investment income for 2015 from Part VI, line 5.	2a	48,707
b	Income tax for 2015 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	48,707
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	1,972,186
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	1,972,186
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	1,972,186

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	1,988,708
b	Program-related investments—total from Part IX-B.	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions.Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	1,988,708
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	48,707
6	Adjusted qualifying distributions.Subtract line 5 from line 4.	6	1,940,001

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				1,972,186
2 Undistributed income, if any, as of the end of 2015				
a Enter amount for 2014 only.			1,471,493	
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.				
4 Qualifying distributions for 2015 from Part XII, line 4 ▶ \$ 1,988,708				
a Applied to 2014, but not more than line 2a			1,471,493	
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.				517,215
e Remaining amount distributed out of corpus				
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				
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.				1,454,971
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.				
10 Analysis of line 9				
a Excess from 2011.				
b Excess from 2012.				
c Excess from 2013.				
d Excess from 2014.				
e Excess from 2015.				

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. . . . ▶

b Check box to indicate whether the organization is a private operating foundation described in section 14942(j)(3) or 14942(j)(5)

	Tax year	Prior 3 years			(e) Total
	(a) 2015	(b) 2014	(c) 2013	(d) 2012	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test—enter					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.					
c "Support" alternative test—enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV **Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see instructions.)**

1 Information Regarding Foundation Managers:

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2))

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed

PEGGY MILLER
109 KENNER AVENUE SUITE 202
NASHVILLE, TN 37205
(615) 383-1395

b The form in which applications should be submitted and information and materials they should include
SEE LINE 2A

c Any submission deadlines
SEE LINE 2A

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors
SEE LINE 2A

Part XV

Supplementary Information(continued)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	1,755,783
b Approved for future payment				
Total			3b	

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2015)

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

List and describe the kind(s) of property sold (e g , real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co)	How acquired P—Purchase (b) D—Donation	Date acquired (c) (mo , day, yr)	(d) Date sold (mo , day, yr)
SEE ATTACHED DEUTSCHE 650829	P		
SEE ATTACHED DEUTSCHE 650828	P		
SEE ATTACHED DEUTSCHE 650828	P		
SEE ATTACHED DEUTSCHE 650828	P		
VANGUARD ST LOSS	P		
HIRTLE CALLAGHAN LT GAIN	P		

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

(e) Gross sales price	Depreciation allowed (f) (or allowable)	Cost or other basis (g) plus expense of sale	Gain or (loss) (h) (e) plus (f) minus (g)
3,381,841		3,504,733	-122,892
5,563,680		5,540,346	23,334
10,382,295		9,963,183	419,112
20,004,154		16,947,441	3,056,713
		17,698	-17,698
375,760			375,760

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			Gains (Col (h) gain minus col (k), but not less than -0-) or (l) Losses (from col (h))
(i) F M V as of 12/31/69	Adjusted basis (j) as of 12/31/69	Excess of col (i) (k) over col (j), if any	
			-122,892
			23,334
			419,112
			3,056,713
			-17,698
			375,760

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(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
AWH GRACE	BOARD MEMBER 1 00	0	0	0
250 ENSWORTH PLACE NASHVILLE,TN 37205				
DRAKE CALTON	BOARD MEMBER 1 00	0	0	0
3511-B RICHLAND AVE NASHVILLE,TN 37205				
BARBARA CANNON	BOARD MEMBER 1 00	0	0	0
332 LYNWOOD BLVD NASHVILLE,TN 37205				
JEAN FARRIS	BOARD MEMBER 1 00	0	0	0
102 THE COMMONS DR NASHVILLE,TN 37215				
IRWIN FISHER	BOARD MEMBER 1 00	0	0	0
539 CLOSE LN NASHVILLE,TN 37205				
KIM HARDIN	VICE PRESIDE 5 00	0	0	0
5912 ROBERT E LEE DR FOREST HILLS,TN 37215				
COURTNEY HOLLINS	PRESIDENT 10 00	0	0	0
424 CHURCH ST STE 1401 NASHVILLE,TN 37219				
EMILY JAMES	BOARD MEMBER 1 00	0	0	0
198 MOULTRIE PARK NASHVILLE,TN 37205				
VANITA LYTLE-SHERRILL	BOARD MEMBER 1 00	0	0	0
1505 JOE PYRON DRIVE MADISON,TN 37115				
LYNN MADDOX	BOARD MEMBER 1 00	0	0	0
3411 GOLF CLUB LANE BRENTWOOD,TN 37215				
ANNE MORGAN	BOARD MEMBER 1 00	0	0	0
200 EVELYN AVE NASHVILLE,TN 37205				
CAROLE NELSON	BOARD MEMBER 1 00	0	0	0
103 WESTHAMPTON PL NASHVILLE,TN 37205				
ARIE NETTLES	BOARD MEMBER 1 00	0	0	0
605 BOWLING AVE NASHVILLE,TN 37215				
SALLIE NORTON	BOARD MEMBER 1 00	0	0	0
4213 SNEED RD NASHVILLE,TN 37215				
JEAN WARD OLDFIELD	BOARD MEMBER 1 00	0	0	0
213 BURLINGTON PLACE NASHVILLE,TN 37215				
CAMMIE RASH	BOARD MEMBER 1 00	0	0	0
868 S CURTISWOOD NASHVILLE,TN 37204				
CAROLINE SHOCKLEY	TREASURER 10 00	0	0	0
2413 FAIRFAX AVE NASHVILLE,TN 37212				
MARGARET SMITH	BOARD MEMBER 1 00	0	0	0
3421 HAMPTON AVE NASHVILLE,TN 37215				
GRAY THORNBURG	BOARD MEMBER 1 00	0	0	0
229 DEER PARK DR NASHVILLE,TN 37205				
GAYLE VANCE	SECRETARY 5 00	0	0	0
160 CHARLESTON PK NASHVILLE,TN 37205				
LUANNE WALTEMATH	BOARD MEMBER 1 00	0	0	0
4401 SUNNYBROOK DR NASHVILLE,TN 37205				

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>				
ALIVE HOSPICE 1718 PATTERSON ST NASHVILLE,TN 37203			GRANT DISTRIBUTION	187,000
COUNCIL ON AGING OF GREATER NASHVILLE 95 WHITE BRIDGE RD SUITE 114 NASHVILLE,TN 37205			GRANT DISTRIBUTION	80,000
FAITH FAMILY MEDICAL CENTER 326 21ST AVE NORTH NASHVILLE,TN 37203			GRANT DISTRIBUTION	50,000
FIFTY FORWARD 174 RAINS AVE NASHVILLE,TN 37203			GRANT DISTRIBUTION	100,000
GILDA'S CLUB NASHVILLE 1707 DIVISION ST NASHVILLE,TN 37203			GRANT DISTRIBUTION	51,525
INTERFAITH DENTAL CLINIC 1721 PATTERSON ST NASHVILLE,TN 37203			GRANT DISTRIBUTION	69,250
MENTAL HEALTH AMERICA OF MIDDLE TENNESSEE 295 PLUS PARK BLVD STE 201 NASHVILLE,TN 37217			GRANT DISTRIBUTION	40,000
NASHVILLE PUBLIC TELEVISION 161 RAINS AVE NASHVILLE,TN 37203			GRANT DISTRIBUTION	75,000
SILOAM FAMILY HEALTH CENTER 820 GALE LN NASHVILLE,TN 37204			GRANT DISTRIBUTION	60,000
ST LUKE'S COMMUNITY HOUSE 5601 NEWYORK AVE NASHVILLE,TN 37209			GRANT DISTRIBUTION	60,000
THE ALZHEIMER'S ASSOCIATION 4825 TROUSDALE DR STE 220 NASHVILLE,TN 37220			GRANT DISTRIBUTION	25,000
REBUILDING TOGETHER NASHVILLE 6101 CENTENNIAL BLVD NASHVILLE,TN 37209			GRANT DISTRIBUTION	200,000
THE ARC OF DAVIDSON COUNTY & GREATER 111 N WILSON BLVD NASHVILLE,TN 37205			GRANT DISTRIBUTION	50,000
CENTERSTONE 1101-6TH AVENUE NORTH NASHVILLE,TN 37208			GRANT DISTRIBUTION	56,850
COMMUNITY RESOURCE CENTER 218 OMOHUNDRO PLACE NASHVILLE,TN 37210			GRANT DISTRIBUTION	5,000
Total			3a	1,755,783

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>				
CUMBERLAND UNIVERSITY 1 CUMBERLAND SQUARE LEBANON,TN 37087			GRANT DISTRIBUTION	14,756
DOMESTIC VIOLENCE PROGRAM INC PO BOX 2652 2106 EAST MAIN ST MURFREESBORO,TN 37133			GRANT DISTRIBUTION	22,500
GUARDIANSHIP AND TRUST CORP 95 WHITE BRIDGE ROAD SUITE 330 NASHVILLE,TN 37205			GRANT DISTRIBUTION	50,000
MARTHA O'BRYAN CENTER 711 SOUTH 7TH STREET NASHVILLE,TN 37205			GRANT DISTRIBUTION	50,000
MUSIC FOR SENIORS 161 RAINS AVENUE NASHVILLE,TN 37203			GRANT DISTRIBUTION	7,000
NASHVILLE FOOD PROJECT 3605 HILLSBORO PIKE NASHVILLE,TN 37215			GRANT DISTRIBUTION	40,000
NEEDLINK NASHVILLE 1600-56TH AVENUE NORTH NASHVILLE,TN 37209			GRANT DISTRIBUTION	20,000
SECOND HARVEST FOOD BANK 331 GREAT CIRCLE ROAD NASHVILLE,TN 37228			GRANT DISTRIBUTION	126,902
SENIOR CITIZENS INC DBA FIFTYFORWARD BORDEAUZ 174 RAINS AVE NASHVILLE,TN 37203			GRANT DISTRIBUTION	40,000
UNITED CEREBRAL PALSY OF MIDDLE TN 1200-9TH AVE NORTH SUITE 110 NASHVILLE,TN 37208			GRANT DISTRIBUTION	25,000
WESTMINSTER HOME CONNECTION 58038 HILL PLACE DRIVE NASHVILLE,TN 37205			GRANT DISTRIBUTION	250,000
Total				1,755,783

TY 2015 Accounting Fees Schedule**Name:** THE WEST END HOME FOUNDATION**EIN:** 62-0516508

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
AUDIT/TAX	24,900	12,450		12,450
BOOKKEEPING	17,165			17,165

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 WEST END HOME FOUNDATION

EIN: 62-0516508

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
2 ORIENTAL RUGS	1992-03-31	4,999	4,999	S/L	7 0000				
SHELVING	1985-01-01	223	223	S/L	10 0000				
2 DESKS	1985-02-21	175	158	S/L	10 0000				
2 - PAINTINGS	1988-12-31	300	300	S/L	10 0000				
DINING ROOM CHAIRS	1989-04-30	8,013	8,013	S/L	10 0000				
2 CHAIRS - REUPHOLSTERED	1989-12-01	1,260	1,260	S/L	10 0000				
4 PICTURES	1991-05-31	125	125	S/L	7 0000				
TABLE	2007-12-07	4,078	4,078	S/L	7 0000				
26I POLISHED BRASS TABLE LAMP	2008-06-04	978	978	S/L	7 0000				
COMPUTER W/ PRINTER	2009-02-18	1,117	652	S/L	10 0000	111			
INTACT SCANNER / COPIER	2011-02-21	4,913	1,883	S/L	10 0000	491			
INTACT SOFTWARE	2011-02-21	4,194	4,194		3 0000				
OFFICE CREDENZA	2011-07-14	525	184	S/L	10 0000	52			
(2) HERMAN MILLER OFFICE CHAIRS	2012-01-10	655	197	S/L	10 0000	65			
ANTIQUE WALNUT 30" ROUND TABLE BREAK ROOM	2012-01-10	337	144	S/L	7 0000	49			
HP OFFICE COMPUTER	2012-01-17	1,136	331	S/L	10 0000	114			

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

TY 2015 Gain/Loss from Sale of Other Assets Schedule

Name: THE WEST END HOME FOUNDATION

EIN: 62-0516508

Name	Date Acquired	How Acquired	Date Sold	Purchaser Name	Gross Sales Price	Basis	Basis Method	Sales Expenses	Total (net)	Accumulated Depreciation
SHELVING	1985-01	PURCHASE	2015-12			223				223

TY 2015 Investments Corporate Bonds Schedule

Name: THE WEST END HOME FOUNDATION

EIN: 62-0516508

Name of Bond	End of Year Book Value	End of Year Fair Market Value
FIXED INCOME		

TY 2015 Land, Etc. Schedule

Name: THE WEST END HOME FOUNDATION

EIN: 62-0516508

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
EQUIPMENT	7,166	3,583	3,583	
FURNITURE AND FIXTURES	21,446	20,544	902	
SOFTWARE	4,194	4,194		

TY 2015 Legal Fees Schedule

Name: THE WEST END HOME FOUNDATION

EIN: 62-0516508

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOUNDATION LEGAL	37,511			37,511

TY 2015 Other Expenses Schedule

Name: THE WEST END HOME FOUNDATION

EIN: 62-0516508

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXPENSES				
ADMIN-INTERNET	593			593
FOOD, TABLE, SUPPLIES	383			383
MISCELLANEOUS	1,198			1,198
OFFICE OPERATIONS	2,934			2,934
ADP	1,407			1,407
DUES / SUBS / MBRSHIPS	42			42
COMMITTEE EXPENSE	2,036			2,036
BOARD RETREAT	3,828			3,828
PAYROLL TAXES	6,876			6,876
INSURANCE	5,272			5,272
MAINTENANCE AND REPAIRS	1,044			1,044
OPERATING	4,060			4,060

TY 2015 Other Income Schedule

Name: THE WEST END HOME FOUNDATION

EIN: 62-0516508

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
MISC INVESTMENT INCOME	8,966	8,966	8,966
BNY - INCOME	102,265	102,265	102,265

TY 2015 Other Increases Schedule

Name: THE WEST END HOME FOUNDATION

EIN: 62-0516508

Description	Amount
UNREALIZED (GAIN) LOSS ON INVESTMENTS	-4,666,565

TY 2015 Other Notes/Loans Receivable Short Schedule

Name: THE WEST END HOME FOUNDATION

EIN: 62-0516508

Name of 501(c)(3) Organization	Balance Due
FUNDS HELD BY HIRTLE CALLAGHAN	375,760

TY 2015 Other Professional Fees Schedule**Name:** THE WEST END HOME FOUNDATION**EIN:** 62-0516508

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
HC-INVESTMENT MANAGEMENT FEES	120,583	120,583	120,583	
MANAGEMENT FEES	13,015	13,015	13,015	
HUMAN RESOURCES	12,764			12,764
PLANNING-WEBSITE & TECHNOLOGY	5,645			5,645
PLANNING-MARKETING & COMMUNICATI	2,000			2,000

TY 2015 Taxes Schedule

Name: THE WEST END HOME FOUNDATION

EIN: 62-0516508

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXCISE TAX - PRIVATE FOUNDATION	40,000			